

**Department of Economic
Development and Tourism**
Umnyango Wezokuthuthukiswa
Komnotho Nezokuvakasha
KWAZULU-NATAL PROVINCIAL GOVERNMENT



**uThukela – ‘The Soul
of the Zulu Kingdom’**

***uThukela District
Tourism Development
Strategy 2012 – Final
Draft***
April 2012

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Executive Summary

Introduction

The Department of Economic Development and Tourism has funded the Review and Development of a Tourism Strategy for uThukela District in order to align to the KwaZulu-Natal Tourism Master Plan and National Tourism Sector Strategy.

The intention of this strategy is to provide a comprehensive over-arching framework that will guide tourism growth and development in uThukela District, and the local municipalities in developing sustainable tourism initiatives that promote greater economic development for the widest possible community. The uThukela District Tourism Development Strategy 2012 aims to facilitate tourism development initiatives, provide marketing directive, unlock latent tourism and economic development potential of the area, provide a list of catalytic tourism projects to be implemented within a five year time frame and beyond, encourage private sector investment, create economic development and sustainable job opportunities for the local urban and rural communities.

The strategy is based on a comprehensive tourism status quo analysis, tourism market supply and demand analysis and relevant policy alignment. The strategy was therefore undertaken in three phases, the Situational Analysis which directed the Strategy formulation phase and the Implementation phase which provides an implementation framework and monitoring and evaluation tool for each project which was prioritised through workshops and assessment criteria that was identified through the strategy formulation phase. This strategy has been widely and broadly consulted with all stakeholders.

Overall Objectives of the Project

The following aspects have been addressed through the uThukela District Tourism Development Strategy 2012.

- A detailed overview of policy and programmes guiding the tourism sector at a national and provincial level
- Review of the existing municipal planning processes for tourism, LED, spatial and other related planning
- Detailed products and activities available in the sector
- A detailed audit of available tourism products and resources,
- SWOT Analysis to identify potential areas of new potential;
- Key analysis of uThukela as a tourism destination through a detailed market assessment of the sector;
- Formulation of a vision, objectives, development plan and management as well as institutional structures relevant to achieving tourism growth in uThukela all aligning to the various provincial and national guiding policies as well as the municipal planning strategies of LED and IDP, amongst others;
- Suitable complementary products identified and conceptualised that could add value to the local tourism sector
- Possible cross-border linkages with neighbouring countries provinces and District Municipalities investigated
- Good contact with stakeholders and engaged in a series of consultative processes, including and not limited to: surveys, interviews, workshops, focus groups and throughout support soft skill transfer for the local tourism and LED officers.
- Undertake the development of the strategy

- Incorporate six detailed project design as part of the strategy development
- A detailed implementation plan and Monitoring and Evaluation Framework

Methodology

The methodology undertaken includes a detailed **Literature** Review of existing research, Integrated Development Plans, Local Economic Development Strategies and previous Tourism Strategies, a **Statistical Analysis** using Quantec, statistics obtained from the various tourism offices and museums, Department of Arts and Culture and other sources. **Stakeholder Consultation** consisted of constant contact made with tourism stakeholders to obtain information and keep stakeholders abreast with the process, by either face to face meetings, email conversions and telephone conversations. Other methods of stakeholder consultation included:

- Online tourism questionnaire to service providers
- Telephonic surveys were carried out with a sample size of 30% .
- 2 day Site Visit
- Workshops with individual local municipalities and a district workshop.

The Importance of tourism in uThukela District Municipality

This project has unveiled that uThukela Tourism plays a significant role both in the district and provincial economies. The importance of tourism in uThukela for the local and provincial economies should not be underestimated and should be promoted at a district and provincial scale to allow for integrated tourism growth and development that benefits more than the district alone. The DM is rich in tourist attractions, and has a world renowned attraction lying at its doorstep with intense history and a defined culture through the key anchors of the UKhahlamba-Drakensberg World Heritage Site and the Battlefields. UThukela DM has proved to retain a unique variety and diverse mix of tourism products which range from avi-tourism, culture and heritage tourism, arts and craft tourism, sport and adventure tourism, nature based tourism and religious tourism which attract varied market segments. These are accompanied by the further potential for other niche areas identified such as rural tourism, rail and community based tourism. Tourism is prominent in the local municipalities within uThukela and its strategic location off the national and provincial movement corridors is of prime advantage. Of key importance is the potential international and national cross boundary linkages and marketing with N3 Gateway, Open Africa, Amajuba, UMzinyathi, Midlands Meander, Maloti-Drakensberg Route (Lesotho), Van Reenen (Free State) etc. Taking into consideration the vibrant mix of tourism assets identified and the strategic location of the district, uThukela is a highly favourable tourist destination and position to absorb and entice a fairly large amount of visitors and should therefore be promoted to reach full potential.

Main Challenges identified and intervention areas

Below is a table of the overall challenges and intervention areas identified through the situational analysis.

Overall Challenges

- Inaccurate, incomplete and lack of visitor statistics and inadequate knowledge management
- Lack of accommodation standards and grading
- Underdeveloped transport and ICT infrastructure and poor signage throughout the district
- Poor and uncoordinated marketing and advertising as well as inadequate distribution of marketing material and lack of district wide branding
- Weak institutional and organisational structures and lack of by-laws
- Poor communication and lack of synergy between public and private stakeholders
- Poor community tourism awareness and involvement
- Lack of market research and development

- Cultural and heritage attractions not maintained
- Crime
- Lack of tour operators, local SMME development and transformation
- General decline in visitor numbers
- Limited product development
- Lack of integration and communication with key organisations and surrounding districts
- Lack of community based initiatives and limited linkages with rural areas and communities
- Limited range of facilities and activities
- Environmental impact of new developments
- Uneven tourism development (e.g. Indaka)

Key Intervention Areas

- Marketing – Experience driven tourism – expand on the brand of the district to local municipalities
- Institutional Capacitating and staffing
- Tourism Economic Infrastructure provision/upgrading/maintenance
- Route Development and Signage
- Tourism Information Centres
- Empower tourism stakeholders
- Monitoring and Evaluation data + undertake research and development + tourism statistics and information
- Development Agency
- Upgrading of tourism channels (ICT)
- Product Development of niche tourism and enhance existing attractions + tourism Grading
- Create relationships with the MDRF, N3 Gateway and Open Africa

Tourism Vision of uThukela District Municipality

The vision statement is informed by the major challenges discovered through the situational analysis. A tourism vision statement outlines what the tourism industry in uThukela wants to be, or how it wants the world in which it operates to be. It is a long-term view. Alignment has been made with the national and provincial visions as well as the district IDP vision and mandate five year strategy. The tourism vision which has been formulated is thus:

In the next five years, uThukela will be a prime tourist destination offering a unique and diverse tourism experience anchored by the uKhahlamba - Drakensberg World Heritage Site and Battlefields with an increased domestic and foreign visitor base, linked to surrounding tourism attractions to actively contribute to the 2020 vision targets of the National Tourism Sector Strategy and KZN Tourism Master Plan.

This will be achieved by nurturing holistic and responsible tourism development which stimulates job creation with a well-resourced and efficiently managed and transformed tourism sector through an integrated destination marketing mechanism’.

Tourism Goals and Strategies

The goals and strategies that emerged from the process in response to the challenges highlighted above are summarized below. These strategies have been directly aligned to the KZN Tourism Master Plan.

Strategic Cluster/Goal	Strategic Thrust	
Strategic Cluster/ Goal 1: Marketing-Develop an effective and efficient marketing system to increase visitor numbers into uThukela Marketing - tourism growth and development (demand)	Strategy 1.1:	Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution
	Strategy 1.2:	Ensuring route development, branding and marketing cohesion
Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion	Strategy 2.1:	Develop and Enhance Core nature based tourist experience aligned with KZN Tourism Master Plan (iconic natural scenic tourism experiences)
	Strategy 2.2:	Develop Niche Tourism Experiences to contribute to a diverse and unique tourist experience
	Strategy 2.3:	Enhance Tour Operating services, hospitality and accommodation to support the uThukela tourism industry
	Strategy 2.4:	Ensure Investment promotion of tourism in uThukela
	Strategy 2.5:	Enhance safety and security in the district to support crime free tourism in uThukela
	Strategy 2.6:	Promote and Accommodate Accessible tourism
Strategic Cluster/Goal 3: People Development-To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence.	Strategy 3.1:	Encourage and ensure transformation of the uThukela tourism industry
	Strategy 3.2:	Stimulate a tourism culture through tourism awareness and education across the district
	Strategy 3.3:	Ensure Quality Tourist Experiences and service excellence
Strategic Cluster/Goal 4: Tourism Infrastructure Investment Framework-To create a favourable built tourism environment to become conducive to growth and development and to boost investor confidence	Strategy 4.1:	Maintain and upgrade Transport (road, air and rail), communication and Services infrastructure to create a conducive tourism environment
	Strategy 4.2:	Maintain and facilitate provision of Signage to direct visitors in and around uThukela
Strategic Cluster/Goal 5: Policy, strategy, governance, research & knowledge management monitoring and evaluation- To create an enabling institutional environment through knowledge management, developing collaborative partnerships and producing planning and regulatory measures	Strategy 5.1:	Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry
	Strategy 5.2:	Enhance tourism through institutional arrangements, collaborative partnerships, communication and policy
	Strategy 5.3:	Promote responsible tourism and green principles in tourism development
	Strategy 5.4:	Provide a sustainable Planning framework to guide future tourism development and investment

List of Priority Projects

Based on assessment criteria a number of priority projects were chosen from a list of initial projects which have been identified through the strategic framework. The chosen priority projects are listed below. An implementation plan and monitoring and evaluation framework has been completed for each of these projects as well as a detailed cash flow. It is from this list that the six projects are chosen for purposes of completing a concept plan. The priority projects are as follows:

Strategic Thrust	Project/Intervention
Strategy 1.1. Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution	1.1.2 Create an Events Calendar and strategy for District and coordinate and lobby the use of local SMMEs to deliver for events
	1.1.4 Appoint service provider to develop a district tourism website with a data base of all attractions, and products as well as potential investments
Strategy 1.2. Ensuring branding and marketing cohesion	1.2.1 Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars
	1.2.6 Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela
Strategy 2.1. Develop and Grow Core tourism experiences (Nature-based and eco-tourism)	2.1.1 Provide support to the upper uThukela Stewardship process - Support the development of the upper uThukela region and community conservation areas and nature reserves to allow for eco-tourism and allied initiatives
	2.1.4 Investigate the expansion and consolidation of Weenen Game Reserve and investigate potential as a Big Five Game Reserve
	2.1.5 Provide Support the restoration of Umsuluzi Game Reserve near Colenso
	2.1.7 Provide support and engage linkages to Trans-Maloti Trekking Trail and MDR
	2.1.8 Upgrade Rock Art Centres in Okhahlamba and link environmental interpretation centre
	2.1.12. Investigate the development of iconic natural scenic tourism experiences such as the Cableway in line with the KZN Tourism Master Plan
Strategy 2.2. Develop Niche Tourism Experiences (Adventure and Sport, Avitourism, Township and Rural Tourism, cultural and heritage tourism and community based tourism)	2.2.4 Investigate potential and impact for rail tourism in light of the KZN Rail tourism Feasibility study with Ladysmith as main station
	2.2.6 Identify and develop key existing and potential Township and Rural Tourism projects: modelled on the best case example of Mpophomeni
	2.2.24 Create a themed heritage and cultural route along R74 (Mpofana – Weenen – Umsuluzi – Colenso) in according with Provincial Spatial Planning Guidelines
	2.2.27 Support MICE tourism by packaging investment project for a conference venue in Emnambithi/Imbabazane/Okhahlamba/Escourt
	2.2.30 Support Craft and Visual Arts exhibition in partner with Dept. of Arts and Culture
Strategy 2.3. Tour Operating services, hospitality and accommodation	2.3.1 Facilitate the reconstruction of the Royal Natal Hotel
	2.3.4 Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /centre
Strategy 2.4. Ensure Investment promotion of tourism in uThukela	2.4.3 Develop an investment promotion strategy and incentives policy and package potential projects in collaboration with TIKZN
Strategy 2.5. Enhance safety and security in the district to support crime free tourism in uThukela	2.5.1 Engage SAPS in tourism awareness and tourist protection in uThukela DM involving all LMs
Strategy 2.6. Promote and Accommodate Accessible tourism	2.6.2 Development and promotion of universal accessibility tourism standards and apparatus and marketing of accessible tourism
Strategy 3.1. Encourage and ensure transformation of	3.1.1 Conduct a baseline study and transformation plan for uThukela Tourism with a M&E system

Strategic Thrust	Project/Intervention
the uThukela tourism industry	3.1.2 Facilitate continuous SMME and Business Support to tourism role-players (e.g. Crafters) through a development programme
	3.1.5 Develop a local procurement strategy linked to local SMMEs and local product owners and investigate Development and Retail of Arts and Crafts for export and through exhibitions in partnership with chain stores
Strategy 3.2. Foster a tourism culture through tourism awareness and education across the district	3.2.2 Facilitate a district tourism skills audit and development plan to guide and involve LMs
	3.2.3 Create a district wide strategy for tourism education and awareness programmes (career choice perception) for interested and passionate communities and school children to be rolled out per LM (See proud Schools project) in partner with an educational institution
	3.2.4 Facilitate the establishment of a hospitality and tourism training and development centre in the district in partner with recognized tourism training centres with satellite offices
Strategy 3.3. Ensure Quality Experiences and service excellence	3.3.5 Develop a system of grading and standards through the Tourism Grading Council of South Africa or SATOUR and linked to CATHSSETA for all accommodation, catering and other service providers including info centres to obtain baseline, provide guidelines, and ensure compliance through an annual monitoring and evaluation system of improvements (e.g. tourism inspector)
Strategy 4.1. Maintain and upgrade Transport (road, air and rail) and Services infrastructure to create a conducive tourism environment	4.1.1 Facilitate and ensure continuous upgrade of R74 with Free State
	4.1.4 Upgrade and maintain the road to Spioenkop (R181)
Strategy 4.2. Maintain and facilitate provision of Signage to direct visitors in and around uThukela	4.2.6 Develop a district wide tourism and advertising signage policy, investment and communication framework to systematically guide allocation maintenance and provision of signage (inclusive of Battlefields signage).
Strategy 5.1. Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry	5.1.1 Formulate a knowledge management strategy and system for collating and presenting information and visitor statistics to track demand include audit of the amount of jobs/employment figures currently occupied in all tourism related initiatives as well as revenue earned with an M/E system in place.
	5.1.4 Develop a district tourism information system and database of all tourism attractions and products that is constantly updated and accessible to all stakeholders and make available on proposed website
Strategy 5.2. Enhance tourism through institutional arrangements, collaborative partnerships, communication and policy	5.2.6 Develop a Regional Tourism Organization incorporating the District Tourism Forum
	5.2.10 Oversee that ALL local municipalities are equipped with a tourism official as per Provincial requirements
Strategy 5.3. Promotion of responsible tourism and green principles in tourism development	5.3.5 Ensure that green principles are incorporated into new tourism developments and investigate incentives for the incorporation of green principles/ link to grading and award system
Strategy 5.4. Provide a sustainable Planning framework to guide and fastrack future tourism development and	5.4.1. Facilitate fast tracking of planning processes (e.g. Development approval processes) as well as land auditing and land availability database to enable development to occur

Strategic Thrust	Project/Intervention
investment	

Priority Project Concept Plans

Six priority concept plans were chosen from the priority list to create project designs as catalytic projects. These project designs include identification of key on-site activities; basic project implementation (budget, timeframes and champions) planning; sustainability and transference of skills as well as the identification of possible funding sources. The six projects chosen which are listed below have been through a consultative process and were unanimously agreed upon at the last Project Steering Committee held toward the development of the uThukela District Tourism Strategy.

- 1) Project 1.2.1. **Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars**
- 2) Project 1.2.6. **Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela**
- 3) Project 2.3.4 **Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /Centre**
- 4) Project 3.2.4 **Facilitate the establishment of a hospitality and tourism training and development center in the district in partner with recognized tourism training centers with satellite offices**
- 5) Project 5.2.6. **Develop a Regional Tourism Organization incorporating the District Tourism Forum**
- 6) Project 2.1.12. **Investigate the development of a Cableway as an iconic signature project in line with the KZN Tourism Master Plan**

Way Forward and Recommendations

The way forward following the formulation of the Tourism Sector Strategy Review and Development is to;

- a) Formally adopt the Tourism strategy
- b) Select and source funding for the priority projects
- c) Implement Priority Projects:

In order to implement the priority projects as per the detailed implementation plan the first step recommended that the district take is to gather all stakeholders involved in the strategy formulation process and agree to implement the priority projects in particular the proposed Regional Tourism Organisation as a municipal entity. The institutional aspect is the main stifling factor of tourism in uThukela and this need to be addressed. A way forward in this regard needs to be decided on with immediate effect. It is recommended that uThukela DM creates a consultation plan to include major stakeholders in and around uThukela to deliberate on tourism in and around uThukela DM.

The district forum could be a platform for an immediate meeting in relation to the current strategy. UThukela DM needs to become a member of N3 Gateway and become involved in tourism plans with Maloti-Drakensberg Route, Ezemvelo KZN Wildlife, AMAFA, Battlefields Route Association, Open Africa etc. A platform for discussions for the meanwhile could be the District Forum. Representivity from Local Municipality's needs to be addressed and support and buy-in from LMs need to be promoted immediately. Alignment of tourism in uThukela needs to be made with the National Service Excellence Requirements to incorporate standards and norms.

Another aspect that needs to be addressed as soon as possible is the issue of adequate staffing. In order for the outcomes of this strategy to be carried out uThukela DM needs to make adequate resources available for purposes of execution of projects. In this instance, additional personnel are required to assist with implementation at a district level.

Based on the importance of tourism in uThukela DM expressed in the paragraphs above, if the DM wants to realise and develop this significant sector to their economy further, then it is a prerequisite that the District Municipality Council fully commit to the implementation of the strategy by making the necessary resources i.e. personnel and funding, available. The approximate funding required for tourism on a yearly basis that the DM need to commit to for the following 5 years is \pm R 3 000 000 in line with the outcomes of this strategy.

1 Project Preamble

The Department of Economic Development and Tourism has funded the Review and Development of a Tourism Strategy for uThukela District in response to the existing Tourism Sector Strategy for the district being outdated and does not talk to the KwaZulu-Natal provincial tourism master plan that is currently under development. In addition, the previous plan was developed prior to the National Tourism Sector Strategy of 2011 and therefore needs to be aligned.

The intention is to then develop a comprehensive Tourism Sector Strategy and Implementation Plan for KZN UThukela District Municipality. The intention of this strategy is to provide a comprehensive over-arching framework that will guide uThukela District, and the local municipalities in developing sustainable tourism initiatives that promote greater economic development for the widest possible community. It will also facilitate tourism development initiatives, provide marketing directive, unlock latent tourism and economic development potential of the area, and come up with a number of tourism projects to be implemented, encourage private sector investment, and create economic development and sustainable job opportunities for the local urban and rural communities.

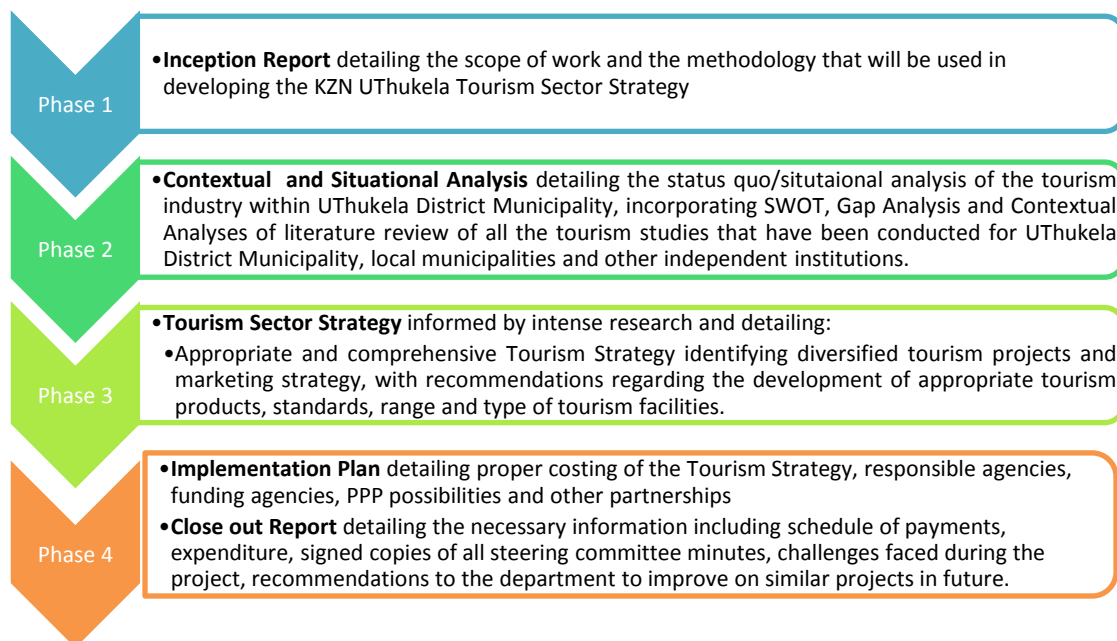
1.1 Overall Objectives

The overall objectives of the strategy are to:

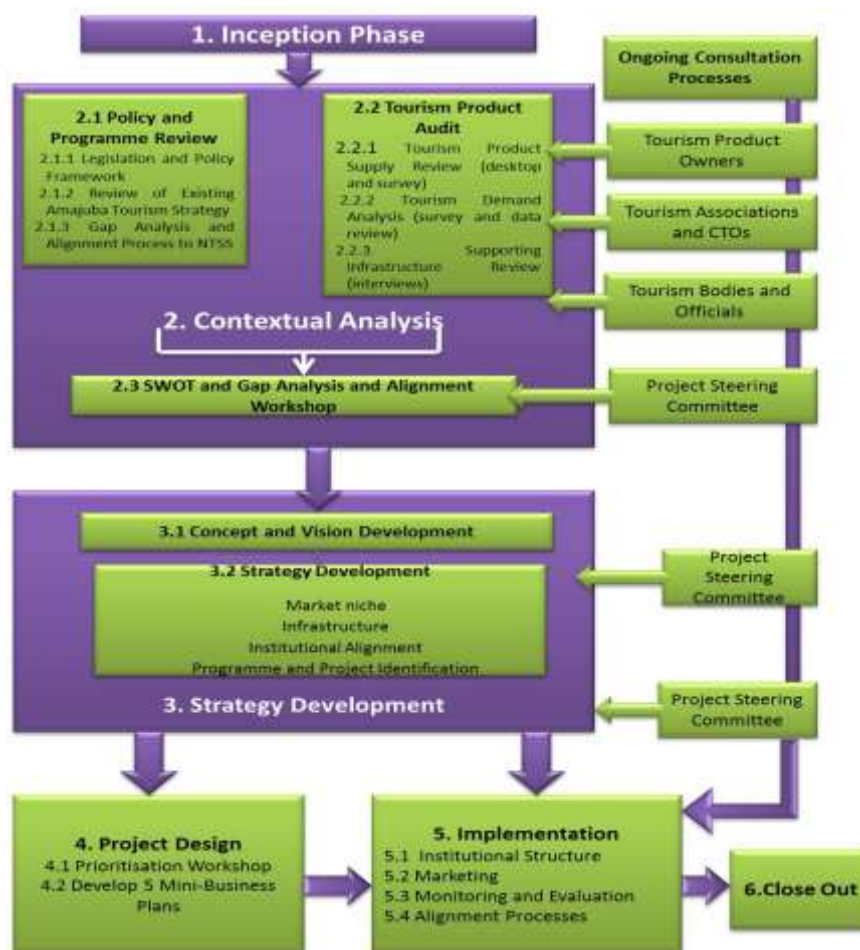
- Provide a detailed overview of policy and programmes guiding the tourism sector at a national and provincial level
- Review of the existing municipal planning processes for tourism, LED, spatial and other related planning
- Detail products and activities available in the sector
- Develop a detailed audit of available tourism products and resources, and utilise the SWOT Analysis technique to identify potential areas of new potential;
- Provide key analysis of uThukela as a tourism destination through a detailed market assessment of the sector;
- Formulation of a vision, objectives, development plan and management as well as institutional structures relevant to achieving tourism growth in uThukela all aligning to the various provincial and national guiding policies as well as the municipal planning strategies of LED and IDP, amongst others;
- Identify and conceptualise suitable complementary products that could add value to the local tourism sector.
- Investigate possible cross-border linkages with neighbouring, countries provinces and District Municipalities
- Maintain good contact with stakeholders and engage in a series of consultative processes, including and not limited to: surveys, interviews, workshops, focus groups and throughout support soft skill transfer for the local tourism and LED officers.
- Undertake the development of the strategy
- Incorporate detailed project design (5 projects) as part of the strategy development
- Develop a detailed implementation plan

1.2 UThukela Tourism Strategy Development Process and Methodology

The uThukela Tourism Development Strategy is broken down into the following four phases in order to meet the above mentioned objectives.



The methodology adopted throughout the process of formulating the uThukela Tourism Development Strategy is outlined in the adjacent figure. This process involves extensive consultation throughout the process through visionary workshops, stakeholder consultation, meetings. The phase presented above make up the methodology.



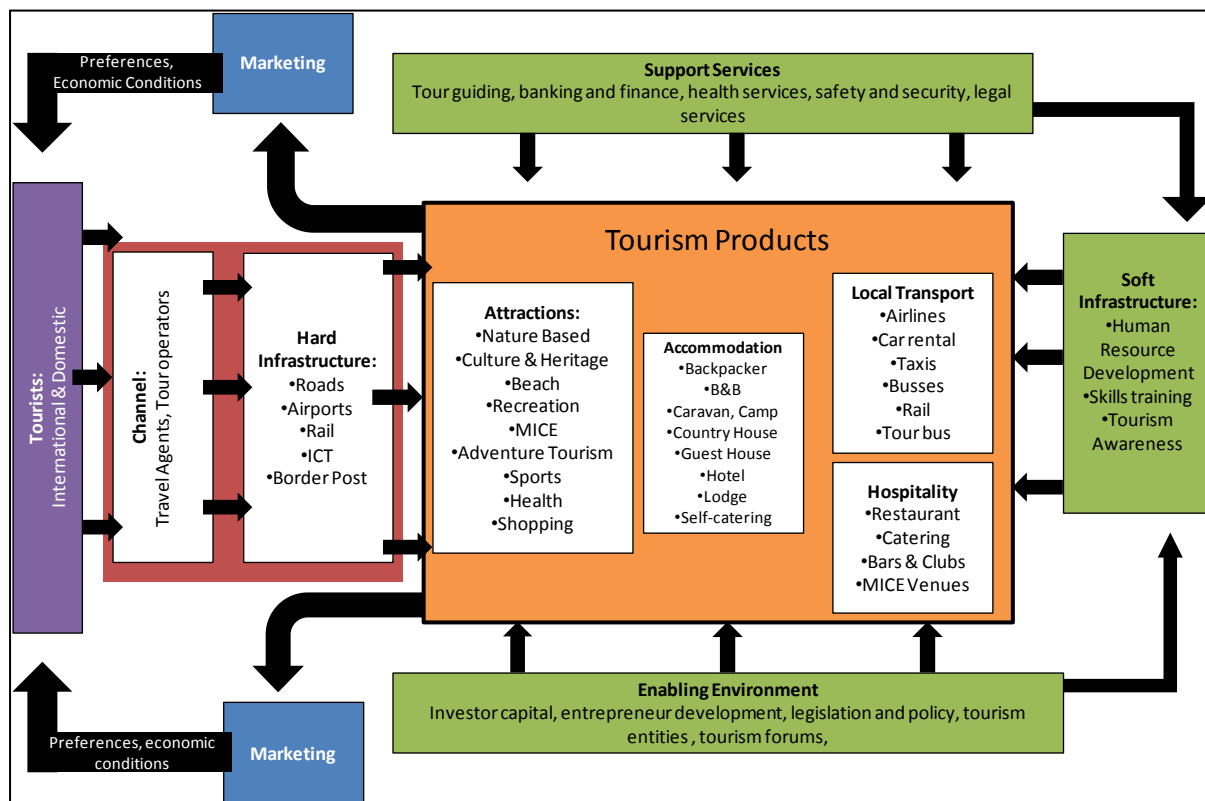
1.2.1 Strategic Approach

Tourism is a term that has been used to describe a wide range of activities and services and is being regarded by many to be a dominant contributor to economic and social development in the country. The definition of tourism to be used for this project is as follows:

“The sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host communities, governments and environments in the process of attracting and hosting these tourists. Anybody who travels away from home, but who does not commute is considered to be a tourist”

- **Tourism as a System**

The tourism industry represents the group of products and services provided to the tourist. It is important to recognise that the tourism industry needs to act as a system in order to function properly. Tourism development within the district therefore needs to create forward and backward linkages between the tourism products and other tourism products, and between tourism products and supporting services. All elements of the system need to be in place for the tourism sector in KZN to operate as a whole.



1.2.2 Data Collection and Consultation

- **Literature Review:** Review of existing research, Integrated Development Plans, Local Economic Development Strategies and previous Tourism Strategies.
- **Statistical Analysis:** A statistical analysis was undertaken using Quantec, statistics obtained from the various tourism offices and museums which were willing and able to provide the information. Museum statistics were obtained from the Department of Arts and Culture. A

visitors book report produced by Tourism KwaZulu-Natal was also used including data bases such as South African Tourism (SAT).

- **Surveys:** Quantitative research was carried out through an online tourism questionnaire to service providers in order to inform the market supply and demand analysis through the internet and telephonically. Telephonic surveys were carried out with crafters and performers. An overall sample size of 30% was used for the surveys.
- **Stakeholder Consultation:** Constant contact was made with tourism stakeholders to obtain information and keep stakeholders abreast with the process, by either face to face meetings, email conversions or telephone conversations.
- **Site Visit:** A two day site visit was conducted where meetings were arranged with stakeholders
- **Workshops:** workshops were intended to be held with each of the five local municipalities. Only two were held due to internal delays at the local municipal level. The workshops were held with Okhahlamba LM and Emnambithi LM. A district workshop was also held with the PSC members to gain deliberation on the sector strategies and the prioritisation of projects.

Local Municipality	Individual interviews, site visits and primary data collection
UMtshezi LM	<ul style="list-style-type: none"> • uMtshezi tourism officer • Fort Dunford / Weenen Museum • Brochure Management
Imbabazane LM	<ul style="list-style-type: none"> • Tourism Official • Local product owners • C-weed Events Management
Indaka LM	<ul style="list-style-type: none"> • LED Officer • Consultant responsible for Indaka LED
Okhahlamba LM	<ul style="list-style-type: none"> • Tourism officer • Winterton Museum • Resorts Association • Okhahlamba Drakensberg C.T.O • Crafters and performers
Emnambithi LM	<ul style="list-style-type: none"> • Historical Society • Local Tour Guides and product owners (Spioenkop, Ladysmith etc), historian • Heritage Committee • Van Reenen Tourism • Battlefields Route Association • Chamber of Commerce • Local Tourism officer and manager
Cross Cutting Stakeholders	TKZN, Dept. of Arts and Culture, N3 Gateway, Bushman River Tourism Association, Roger Layton and associates, AMAFA, Dept. of Transport, Ezemvelo KZN Wildlife, uThukela LED manager, DEAT, Tourism Specialist-Maloti-Drakensberg Tourism Association, Okhahlamba Development Agency

2 Contextual and Situational Analysis of uThukela District

This section accounts for Phase 2 of the uThukela Tourism Strategy Development process as described above. This phase entails two distinct aspects, that being the Policy and Programme Review and the Situational Analysis. This phase is crucial to the strategy development as it provides a solid foundation from which to formulate the strategy. This phase provides a status quo of tourism in uThukela and the five local municipalities which it governs through a supply and demand analysis of what exists in the area and who it attracts. It also covers the institutional review of existing literature regarding tourism in uThukela and updates in terms of the National Tourism Sector Strategy and KwaZulu-Natal Tourism Master Plan.

Objectives:

The objectives of the strategy in direct relation to the Terms of Reference and Scope of Work for the project are as follows;

- **Undertake a Policy and Programme Review:** this includes a legislation and policy review, a review of existing uThukela Tourism Strategy and alignment to the KZN Tourism Master Plan process as well as the National Tourism Sector Strategy.
- **Undertake a Tourism Product Audit (Supply Assessment):** this involves developing a Tourism Product Supply Review using both existing tourism product data bases as well as detailed survey of the area and product owners. Site visits to each of the local municipal areas to develop profile of the products, supportive infrastructure and markets. This also entails developing detailed product owner surveys to augment desktop data available and a *survey* of existing products, tourism associations, officials and organisations via telephone, email and fax.
- **Undertake a Tourism Demand Analysis:** This includes the following:
 - Review of current market trends using data sets from Quantec, Tourism KZN
 - Develop detailed *tourist demand surveys* to examine the market trends
 - Model tourism demand figures for the district based on product supply parameters
- **To undertake a spatial analysis**
- **To undertake a socio-economic analysis**
- **To conduct a tourism institutional analysis**
- **Formulate a S.W.O.T Analysis of tourism in uThukela**

2.1 Contextual Analysis

The contextual Analysis entails an overview of the relevant National and Provincial Policies and Legislation which the tourism strategy needs to be aligned to. These include the recent, New Growth Path, the recent Provincial Growth and Development Strategy 2011, the Provincial Spatial Economic Development Framework, National Tourism Sector Strategy 2011 and the Draft KZN Tourism Master Plan.

2.1.1 Alignment with New Growth Path

The new growth path is a broad framework that sets out a vision and identifies key areas where jobs can be created. It was introduced in 2011. The new growth path is intended to address unemployment, inequality and poverty in a strategy that is principally reliant on creating a significant increase in the number of new jobs in the economy, mainly in the private sector. Tourism has been identified in the New Growth Path as one of the six key sectors of economic growth in South Africa. The new growth path sets a target of creating five million jobs in the next ten years. This target is projected to reduce unemployment from 25% to 15%. Critically, this employment target can only be achieved if the social partners and government work together to address key structural challenges in the economy.

The new growth path seeks to place the economy on a production-led trajectory with growth targeted in 5 jobs drivers and opportunities for employment creation by 'securing strong and sustainable employment

Implications for uThukela District Tourism Strategy

The New Growth Path as macro economic policy needs to be adhered to as tourism is a key economic sector. The mandate is to create jobs and it then becomes the duty of local government to aid in achieving such a target, especially uThukela, as it is rich in renowned tourism products.

creation'¹. The job drivers are, infrastructure, focussing on job creation through the main economic sectors, seizing the potential of new economies, investing in social capital and public services as well as spatial development. Tourism forms one of the key sectors which government will focus on to unlock economic potential. The tourism industry is aimed to produce 225 000 jobs by 2015. Key action areas include strengthening measures to expand tourism infrastructure and services; promote targeted marketing campaigns; manage costs; address quality assurance and logistics; improve training and identify employment and entrepreneurial opportunities for the youth. The job target for the green economy is 300 000 (additional) jobs by 2020.

The new growth path commits South Africa to work in partnership with other countries on the continent to build a single African integrated economy embracing one billion consumers, and to focus immediately on expanding economic links with the rest of the continent as being done with the Trans Frontier Conservation Areas in Okhahlamba LM.

2.1.2 Alignment with the National Development Plan²

The National Development Plan is optimistic that South Africa can combat poverty and reduce inequality within the next 20 years as South Africa as the skills, people, willingness and resources to do so through the National Development Plan. Targets of the plan include the creation of 11 million more jobs by 2030 through a number of objectives which includes amongst others, increase value for money for tourists by selling regional packages that meet all pocket sizes and consider a single visa for SADC visitors. This will in turn have an impact on potential international tourists entering uThukela. The plan also looks to developing relationships between the three tiers of government. The National Development plan sees the tourism industry as labour intensive, capable of stimulating the growth of small businesses and as developing other spin offs such as foreign direct investment and the craft industry. The table below shows the key policy issues regarding tourism as identified through the National Development Plan. The uThukela DM Tourism Strategy needs to take cognisance and align to the imperatives of the National development Plan. It starts to do this by developing the tourism SMMEs and cooperatives in uThukela through forms such as training and capacitating emerging businesses and entrepreneurs as well as increasing visitor numbers.

Key policy issues include:

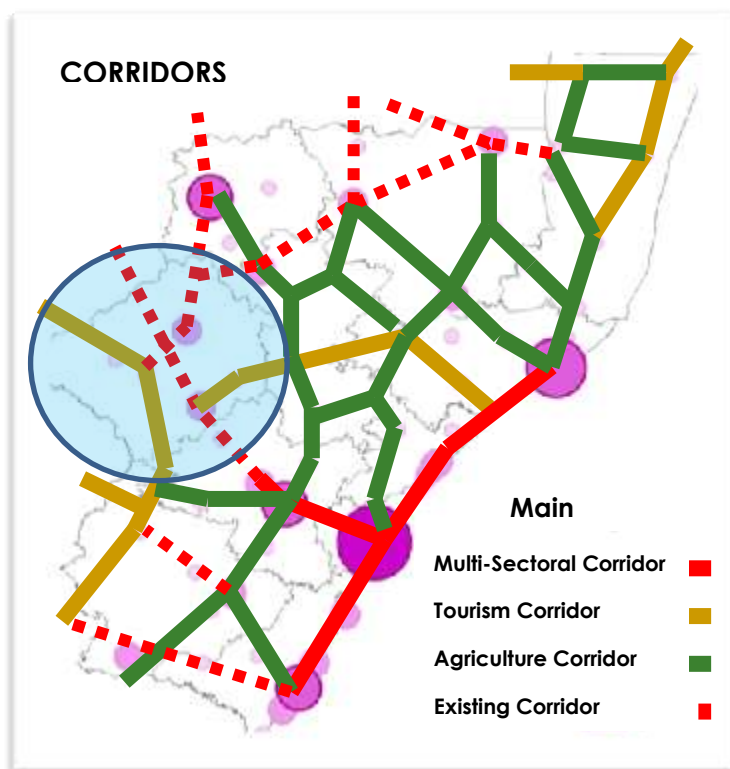
- Emphasis will be placed on increasing the total number of tourists entering the country, and an increase in the average amount of money spent by each tourist, or both.
- The ease of doing business, as well as availability of appropriate levels of tourism infrastructure (particularly transport and accommodation), will play an important role in attracting different types of tourists.
- Foreign business tourists arriving by air generate the most significant multipliers. Among others, South Africa will be positioned as business and shopping centre for the region.
- South Africa can do more to develop the region as an international tourist destination by emphasising the broader biodiversity and range of tourism products, and making it easier for tourists to travel between countries in the region. A Schengen-type visa for the region will be considered.

¹ New Growth Path 2011

² National Development Plan 2011

2.1.3 Alignment with Provincial Spatial Economic Development Framework

This strategy is developed to align economic planning for the province with the National Spatial



Development Perspective and give a spatial dimension to the then Provincial Growth and Development Strategy. It therefore focuses on “fixed infrastructure investments in areas of economic development potential (whether realised or dormant), and prioritises areas of greatest need based on poverty densities”³. The PSEDs focuses on a number of sectors seen to have the potential to drive economic growth in the province and address poverty and unemployment. Tourism, both domestic and foreign is one of these economic sectors, among agriculture and commerce which relates directly to this strategy. The PSEDs states that “The primary tourism potential within the province is in the beach tourism, cultural tourism and eco-tourism markets. It recognizes the Battlefields Route and Drakensberg region as areas of national tourism importance.

It also recognizes creating opportunities for poor communities through tourism.

The PSEDs uses the key structural principles of the development of nodes and corridors to link economic development opportunities spatially. The corridors prioritised through the PSEDs which fall within the boundaries of uThukela District, as shown on the map below are the, UKhahlamba, and the Weenen-Nkandla-Eshowe tourism corridors. The PSEDs also identifies focus areas for tourism in uThukela which are:

- Battle fields routes: development of linkages to benefit previously disadvantaged
- Drakensberg eco-tourism: develop cultural tourism opportunities with bordering communities

The uThukela strategy will adhere to the principles and provincial framework that the PSEDs sets out through promoting the relevant implications, such as promoting cultural and eco-tourism and the Drakensburg and Battlefields attractions.

2.1.4 Alignment with Provincial Growth and Development Strategy 2011

PGDS Vision: KWAZULU-NATAL - A PROSPEROUS PROVINCE WITH A HEALTHY, SECURE AND SKILLED POPULATION, ACTING AS A GATEWAY TO AFRICA AND THE WORLD.

By 2030, the PROVINCE OF KWAZULU-NATAL should have maximized its position as a GATEWAY to South and Southern Africa, as well as its human and natural resources so creating a safe, healthy and sustainable living environment. Abject poverty, inequality, unemployment and current disease burden should be history, basic services must have reached all its people, domestic and foreign investors are attracted by world class infrastructure and a skilled labour force.

The people shall have options on where and how they opt to live, work and play, where the principle of putting people first and where leadership, partnership and prosperity in action has become a normal way of life.

growth through catalytic and developmental interventions, within a coherent equitable spatial development architecture, putting people first, particularly the poor and vulnerable, and building sustainable communities, livelihoods and living environments”⁴. The objectives of the PGDS are as follows:

- *‘Be the primary strategy for KwaZulu-Natal that drives growth and development in the Province to 2030;*
- *Mobilize and synchronize strategic plans and investment priorities of all spheres of government, state owned entities, business, higher education institutions, labour, civil society and all other social partners towards achieving the desired growth and development goals, objectives and outcomes;*
- *Spatially contextualise and prioritise interventions so as to achieve greater spatial equity;*
- *Develop clearly defined institutional arrangements ensuring decisive leadership, robust management, implementation and ongoing reviewing of the growth and development plan*⁵.

KwaZulu-Natal’s development strategy over the next 20 years must therefore carefully select the economic and development drivers which will enhance the benefits of growing integration into Africa and the global economy. **Trade and tourism will remain the lead instruments of this integration process**, but many new areas of opportunity must also be fully explored and developed.

The PGDS refers to the uKhahlamba Drakensberg as one of two world heritage sites located in the province of KwaZulu-Natal. The uKhahlamba site (243 000 ha) includes a wide diversity of habitats and protects a high level of endemic and globally threatened species, especially birds and plants. The Drakensberg is one of the best watered, least drought-prone areas of southern Africa, and has particular significance for catchments protection and the provision of high-quality water supplies for surrounding communities; a number of rivers originate from the park as well as being one of the most important archaeological areas in southern Africa. These heritage sites are vitally important for the regeneration of natural resources and their value for **eco-tourism** is clear.

The PGDS recognises tourism as a key sector within the KZN economy and holds much potential however, falls short as an international tourist destination. The Province’s Tourism Strategy presents a thorough analysis and makes recommendations which address local and international appeal such as marketing of SA’s urban centres more vigorously, diversifying the appeal to be wider than nature-based tourism, as well as recommending development of new products such as resorts.

The PGDS focuses on prioritising and strengthening the key economic sectors which includes tourism and identifies the importance of waste management in light of health and tourism development.

Eco-tourism and the degradation of natural resources are of key concern. The PGDS acknowledges the effects of climate change. KwaZulu-Natal faces two critical environmental challenges, namely the effects of climate change, as well as the environmental degradation within the province. Most of the ecosystems within the province are deemed to be vulnerable to degradation from human activity

The PGDS is crucial in understanding the role of tourism on a provincial scale and to keep abreast with and align the uThukela District Tourism Strategy to the latest goals and imperatives of government. In alignment with the PGDS uThukela Tourism should consider eco-tourism, aim to be globally integrated and seen as an economic and development driver as well as conservation tourism. uThukela Tourism should as aligned with the PGDS focus on marketing and a diversified tourist experience. In light of the fact that the PGDS acknowledges the effects of climate change as a factor that needs to be mitigated, sustainable tourism and agriculture need to be fostered. The preservation of natural resources is also important and tourism should play a role. Trans frontier Conservation areas, in this case the Maloti-Drakensberg Route, need operation and management (through a management agency).

⁴ Provincial Growth and Development Strategy 2011

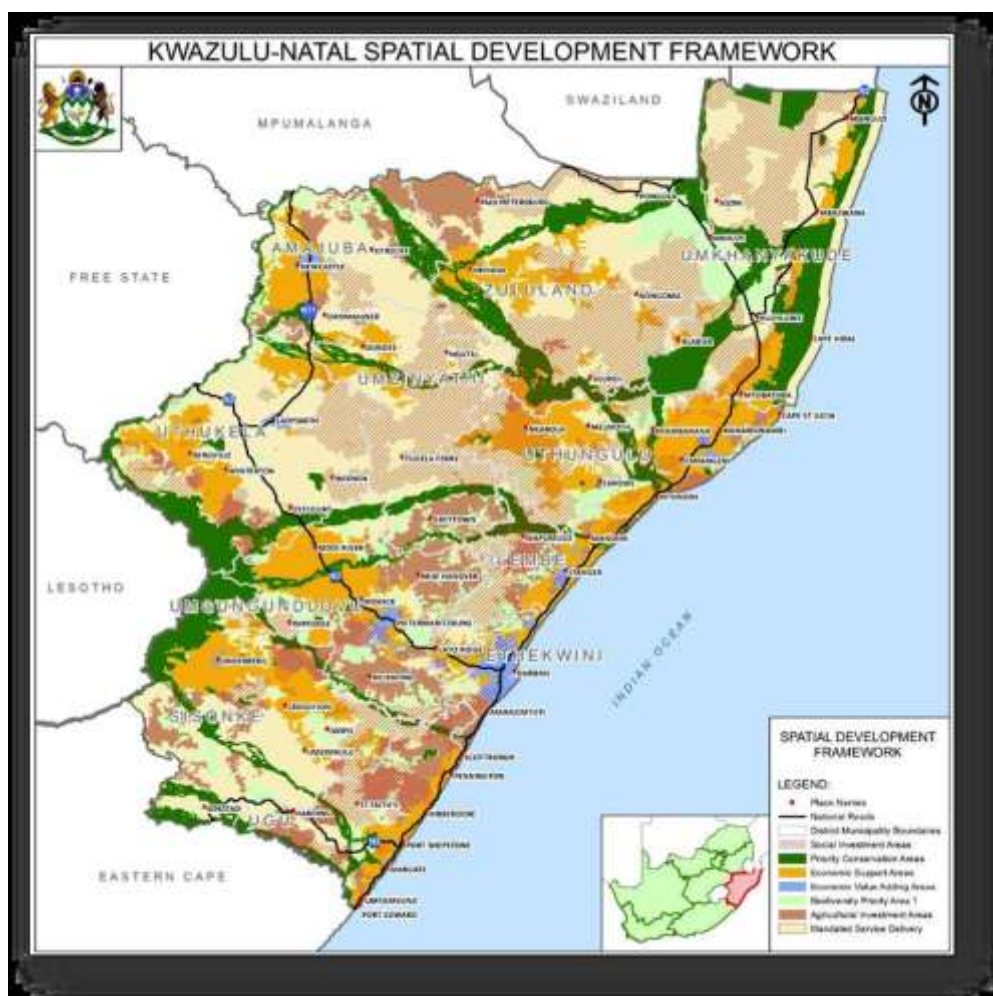
⁵ *abid*

while ecosystems within the most populated coastal areas are increasingly endangered. On the other hand, KZN has climates and natural resources to support sustainable agriculture and tourism.

The PGDS identifies that there are Trans frontier conservation/tourism parks and related structures in place. One of the strategic objectives of the PGDS is to manage pressures on Biodiversity and is concerned with endangered ecosystems. It refers to the need for operation and management of the Trans Frontier Conservation Areas. This will ensure the efficient operation of these parks and the creation of a tourist experience that will result in a win-win scenario for all beneficiaries. An intervention relating to uThukela District is to establish a management agency for the uKhahlamba-Maloti TFCA. As part of the Governance and Policy strategy the PGDS aims to promote the establishment and coordination of local development agencies at District level. This is relevant for the case of uThukela as it was identified that a development agency is needed which will also drive tourism development and the Maloti Route traverses uThukela District.

The Spatial Development Framework of the PGDS recognises Escourt and Ladysmith as tertiary nodes at a provincial scale which are defined as centres which should provide service to the sub-regional economy and community needs. It also recognises Winterton and Bergville as centres which should provide service to the sub-regional economy and community needs. The conservation corridors form a major part of the SDF (as shown below) and are intended to be protected areas with continuous ecosystems and biodiversity and have been identified by Ezemvelo KZN Wildlife. They are important for eco-tourism and can therefore generate economic activity such as tourism development. This is also linked to the Biodiversity priority areas. Conservation tourism is identified as serving priority.

Figure 1 –
KwaZulu-
Natal
Spatial
Development
Framework
(Source;
Provincial
Growth
and
Development
Strategy
2011)



2.1.5 Alignment with the National Tourism Sector Strategy 2011

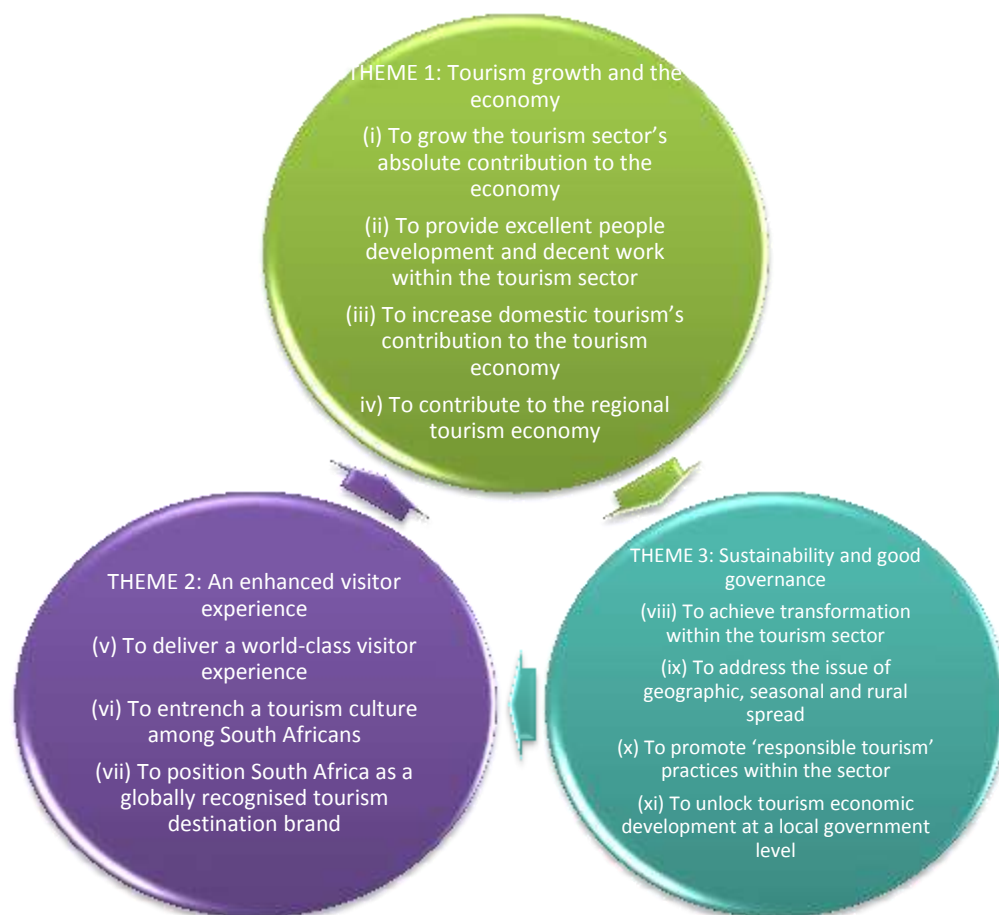
VISION

To be a top 20 tourism destination in the world by 2020

MISSION

Significantly growing a sustainable tourism economy in South Africa, with domestic, regional and international components, based on innovation, service excellence, meaningful participation and partnerships

The NTSS is seen as a means to realising growth targets as put forward by the New Growth Path through tourism. 'The strategy put a renewed focus in marketing and brand management, stimulating regional and domestic tourism, development of business and events tourism, niche product and rural tourism development, responsible tourism development, increasing investment in the tourism sector, transformation of the sector, promoting decent work, improving service excellence, addressing community beneficiation and effective cooperative partnerships'. The three themed based objectives/targets that the NTSS aims to achieve by this 10 year strategy are as follows:



UThukela District in keeping with this National Strategy need to align to the above illustrated themes and objectives where applicable in order to contribute to the building of tourism in South Africa as a whole.

A set of strategic clusters and thrusts were identified through the NTSS to realise the above mentioned goals and objectives. They are as follows:



The table below presents the baseline, and targets set for the respective tourism components defined by the NTSS in South Africa.

Focus	Measure	Baseline (2009)	2015 target	2020 target
GDP	Industry (direct impact)	R71,4 bn (3% of GDP)	R118,4 bn	R188 bn (2,9% of GDP)
	Economy (direct and indirect impact)	R189,4 bn (7,9% of GDP)	R318,16 bn	R499 bn
Visitor Arrivals	Foreign	9933966	2068030	15000000
	Domestic	14600000	16000000	18000000
	Trips	30.3m	40m	54m
Employment	Direct	389 100	403 900	461 700
	Direct and Indirect	919 800	968 300	1 097 000
Investment	Public	R82,4 bn	R100 bn	R118 bn
	Private	no baseline data		
	Foreign Direct	R3 bn	R3.8 bn	R4 bn
Transformation	No of companies with a BEE scorecard	no baseline data		

	No of companies with high level accreditation	no baseline data		
	Number of companies reaching tourism charter targets	no baseline data	70% of charter compliance	
	Number of black majority owned companies	no baseline data		
Rural Tourism demand	Number of visitors to rural businesses:	no baseline data		
	Number of attractions in rural areas:	no baseline data		
Number of bed nights in low season months	Foreign	15.80%	21.10%	25%
	Domestic	5.30%	7.10%	10%
Visitor Experience	Number of visitors whose experience meets or exceeds their expectations	no baseline data		
Awareness	increased levels of awareness of tourism and its value	no baseline data		
	Increase in levels of community participation	no baseline data		

Table 1- Baseline and targets of the NTSS (Source: National Tourism Sector Strategy, 2011)

2.1.6 Alignment with the KwaZulu-Natal Tourism Master Plan 2011

The KZN Tourism Master Plan is aligned to the above NTSS and guides all tourism development in KwaZulu-Natal. UThukela District Tourism Strategy has to therefore be aligned to this plan. The master plan is referred and aligned to throughout this document where relevant. The Master Plan contains four strategic thrusts, namely;

- **Marketing:** this defines the direction of marketing in the province and details the current provincial branding and future changes in definition of market segmentation which will be relevant for planning for tourism in uThukela as the district strategy needs to align to the marketing strategy of KZN. This section also allocates preferred marketing medians per market segmentation and budgets aligned among other things.
- **Product Development and Planning:** the main strategic focus area is beach tourism which receives priority with regard to funding etc., with a secondary focus on experiences including the UKhahlamba-Drakensberg WHS/Maloti-Drakensberg TFCA for scenic experiences.
- **People in Tourism:** 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.
- **Policy, strategy, governance, research & knowledge management monitoring & evaluation:** this provides direction in terms of the institutional structure to be adhered to which is incorporated into the institutional analysis.

The Master Plan emphasises the need to move toward an experienced based approach rather than marketing destinations/geographic areas. One of the three core experiences identified is 'Scenic/Natural Beauty/ Mountains' with the following rationale: '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’. This is directly related to uThukela as one of the district main attractions (UKhahlamba-Drakensberg World Heritage Site) falls within this category. After core experiences are marketed the supporting niche sectors are identified which include, Avi-tourism, agri-tourism, culture and heritage tourism, rail tourism, MICE and adventure tourism among others. These niche experiences are relevant for uThukela District. It is clear to see that the KZN Master Plan recognises niche tourism which relates to the Department of Trade and Industry 2010 National Industrial Policy Action Plan- Tourism Sector document. This identifies the development of niche tourism as one of the three sectors that need attention in South Africa.

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 listed in the table below; uThukela District Tourism Strategy acknowledges the iconic project falling within its jurisdiction and will align to incorporate this iconic project as a priority within the tourism strategy, i.e. the Drakensberg Cable Car.

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.

The following table presents the baseline and targets set out for KwaZulu-Natal through the KwaZulu-Natal Tourism Master Plan.

Objectives	Measure	2009 (or 2010) Baseline	2020 Target	2030 Target
GDP	Direct GDP impact	R22bn	R65,2bn (R40,4bn 2009 Rands)	
	Indirect GDP impact	R33bn	R98,4bn (R60,66bn 2009 Rands)	
Foreign tourists	Total visitors	1 213 001	2 095 410	3,45 million
	International day visitors	350 541	657 584	1,15 million
	Foreign tourists	862 460	1 437 826	2,33 million
	Inter-continental tourists	348 434	482 724	650 000
	African Tourists	514 026	955 102	1,68 million
Domestic Tourists	Total domestic tourists	8 800 000	16 301 935	24,17 million
	Domestic holiday tourists	3 168 000	7 128 000	10,85 million

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

Table 2: Baselines and targets from the KwaZulu-Natal Tourism Master Plan (Source: KZN Tourism Master Plan)

2.1.7 Municipal Finance Management Act No. 53 of 2003

The Municipal Finance Management Act guides the management of financial affairs within a municipality and aims to ‘secure sound and sustainable management of the financial affairs of municipalities and other institutions in the local sphere of government; to establish treasury norms and standards for the local sphere of government; and to provide for matters connected therewith’. As can be seen from the aim taken from the Act, this Act serves as a regulatory mechanism for all financial affairs and provides direction with relation to budgets, capacity building and responsibilities of officials. This is therefore one of the main acts that need to be taken into consideration.

An important part of the Act which needs to be considered for the uThukela Tourism Strategy relates to Municipal entities. Chapter 10 of the Municipal Finance Management Act relates to municipal entities. It details the establishment of entities, roles and responsibilities of accounting officers, considers budget implications as well as general financial governance of municipal entities amongst other aspects. These aspects will need to be taken into account should a municipal entity be formed in the case for uThukela. The municipal Finance Management Act needs to be considered together with the Municipal Systems Act.

2.1.8 Municipal Strategies Review

Given the table below which summarises the availability of the following policy documents for the district and local municipalities, all local municipalities have Integrated Development Plans and Local Economic Development Plans, however, only two have tourism strategies. The others have tourism incorporated within the LED strategy. This indicates that tourism is seen as an integral part of local economic development and as an economic driver. A detailed review of the strategies is undertaken in the situational Analysis under each local Municipal Review.

	IDP	LED	Tourism Sector Plan/Strategy	Spatial Development Framework
UThukela DM	✓	Under review	Forthcoming	Yes
UMtsheni LM	✓	Yes	No	Yes
Okhahlamba LM	✓	Yes	No	Yes
Imbabazane LM	✓	Yes	Yes - 2008	Yes
Emnambithi LM	✓	Yes	Yes - 2006	
Indaka LM	✓	Yes	No	-

The table below indicates whether or not the local municipalities have by-laws pertaining to tourism development. As it can be seen, there is a gap in this regard with not all LMs having by-laws. By-laws are necessary for regulation of the tourism industry.

Local Municipality	By-Laws related to tourism
UMtsheni LM	No
Indaka LM	No
Emnambithi LM	-
Okhahlamba LM	-
Imbabazane LM	Forth Coming related to business licensing etc.
uThukela District	No but there is a MOU with TIKZN for implementation of future projects

2.1.8.1 UThukela Strategy Review

- uThukela Integrated Development Plan Review 2011/2012

Vision:

‘An improved quality of life for all in a globally interconnected, stable and developed region’.

The uThukela vision is to be realised through key focal areas which includes local economic development. Tourism is a key economic sector and therefore forms a large part of local economic development for the district. The mission which relates to this is to enhance development and increase service delivery. Development includes tourism development which as indicated by the IDP needs to be further exploited. The IDP acknowledges that Okhahlamba Municipality has the most recognized distinctive economic landmark, i.e. UKhahlamba Drakensberg World Heritage Site. Tourism infrastructure is underdeveloped and completely non-existent in traditional areas. Particular attention needs to be paid to accessibility factors: roads, transport and signage.

The challenges identified include, ageing infrastructure and limited services, lack of skills, high unemployment and poverty and attraction of investors, tourists and skilled human resource due to its location away from the two major cities (Durban and Johannesburg). The strategies developed related to tourism are to promote tourism in the District as the District is rich in Tourism especially in the Drakensberg Mountains, Implementation of an SMME’s programme and promote PPP’S, through efficient and effective management of resources and assets, through the creation of an environment that is conducive to Economic Development, capacitating of Cooperatives in the District, utilisation of the shared services centre, optimal utilisation and management of the District resources, and Localisation of the National policies.

The IDP makes the following observation of tourism in the district: ‘The World Heritage Site is located within uThukela District. UThukela district municipality is a unique mix of the majestic Drakensberg Mountains, historical and world renowned battle sites and out of Africa experiences. These qualities have created a District that is a tourism magnet in Southern Africa.’ This view is shared by the LED Strategy of 2004 which sees uThukela as ‘Tourism Potential’. There are various investment opportunities which have been identified and include Weenen Cultural Theme Park, Dinosaur Valley, the strategic location with two national roads traversing the area (N3 and N11), Mnweni Cable Car, Woodstock Dam and Cannibal Route amongst others.

There is an opportunity to exploit economic opportunities in the tourism sector in Okhahlamba and Emnambithi. Okhahlamba has UKhahlamba-Drakensberg World Heritage site while Emnambithi is linked to the popular Battlefields products. Further studies to explore the location opportunities brought by the N3 and N11 corridors need to be investigated.

Projects related to the above mentioned IDP Priorities:

Mnweni Cableway: A specific project planned for the area is the Mnweni cableway. Feasibilities have been done however, there have been various issues with that regard. Contact made with a stakeholder of that project indicated that the cableway project is being pursued and funding is trying to be sourced. The project involves international and National stakeholders as it is a Trans boundary project with Lesotho.

Dinosaur Valley: A feasibility study has been undertaken for an opportunity to invest in archaeology based visitor attraction in an established tourism sector of the Drakensberg Mountains based on fossil findings. The project is located in the Injisuthi Valley. The project encompasses promotion of the Zulu culture and traditions, there will also be a hut acting as a museum. The projects aspires to involve the community in the research component of the project, entail arts and crafts services, biking and walking trails, and cultural and outdoor activities.

There is a current project based on paleontological type tourism at Golden Gate Highlands National Park (Free State) a planned interpretation and research centre for dinosaurs (in association with the Bernard Price Institute at Wits) which was suggested that the Dinosaur Valley be linked to.

Woodstock Dam: there exists a feasibility funded by UThukela District for an opportunity to invest in fishing and camping attraction on the banks of the Woodstock Dam located in the foothills of the Drakensberg. This study proposes resort development and traditional accommodation (in the form of rondavels)

Cannibal Caves: Feasibility for these routes has been undertaken, however, there has been difficulty in receiving funding for the project business plan. A site at the Ilenge Mountain (in Ward 7) approximately 55km from Ladysmith has been identified as a potential tourism site based on previous cannibalism activities in caves located on the mountain.

Weenen Cultural Centre: Feasibility for this route has been undertaken. The objective is to invest in tourism fascination with the customs, traditions and culture of the amaZulu – the People of Heaven.

Other projects being implemented in UThukela which are funded by DEAT are:

The **Zithande Project** which is a social responsibility project will be implemented at Ladysmith (Wimpy Park) and the project is intending to protect watercourse as well as developing a park in an open space at the side of the river. It entails landscaping and beautification of a park through plantation of trees, shrubs & other deliverables.

‘Mazibuyele Emasisweni Cultural Village’. It entails the construction of a cultural village, with stores selling various crafts & related products, a restaurant, and conference facility as indicated by DEAT. The aim is also to accrue benefits to the local communities.

- **UThukela Local Economic Development Plan 2004**

The uThukela LED is currently under review, however, a brief reference should be given to it and the projects identified and their progress. The LED compiled in 2004 sees tourism as one of the major economic sectors in uThukela which needs attention to develop. The priority projects are tabulated below with the progress. The tourism strategy within the LED recognises the Drakensberg and Battlefields as major draw cards to the district as well as the border of Lesotho, natural resources and road network.

Tourism Projects as identified by the LED Strategy

- | | |
|--|--|
| <ul style="list-style-type: none"> • Tourism Development Plan. • Signage on the N3. • UThukela Gateway Concept Development and Feasibility Study. • World Heritage Site Tourism Initiative. • Investigation of Tourism Development Potential of Woodstock, Spieonkop and Wagendrift Dams. • Mweni Valley and the Cable-way. • Zulu Garden of Remembrance. • Dinosaur Valley. • Gongolo Game Reserve. • Any number of craft centres and cultural villages. • uThukela Biosphere Reserve • Tourism policies – historical and cultural tourism. | <ul style="list-style-type: none"> • Igongolo Game Reserve. • Support to Publicity Associations. • Tourism Potential in Traditional Authority and Freehold Areas. • Weenen Cultural Theme Park. • Cannibal Route. • District Craft Centre. |
|--|--|

There a large number of potential tourism projects. For example UMTshezi Municipality has a number of identified projects in the Gongolo Game Reserve, the Bushmans River, the Tugela Biosphere, the optical illusion road, and other smaller projects. In particular this Municipality would benefit from a broader and more powerful agency within the District, in order to better to capitalize on the assets in the area. The sector is well established. The table below depicts the priority projects and their status as indicated by the LED Unit.

Project	Status
Regional Tourism Forum	District Tourism Forum Exists, But Needs To Be Functional
N3 Signage	??Dept. Of Roads
UThukela Gateway Concept	Feasibility done many years ago, but no movement on this project for at least 7 years
Mweni Valley And Cableway, Zulu Garden Of Remembrance And Wood Stock Dam Redevelopment	No real progress, mentioned in discussions now and again.
District Craft Centre	Not Implemented
Dedicated Marketing Institutional Arrangements	Not Implemented

Table 3 – Tourism Priority Projects and status (Source: UThukela and LED Unit)

UThukela Tourism Development Plan 2007

The tourism plan has been developed in 2007. In the tourism plan the secondary corridors are identified to each tourism node along the World Heritage Site. These routes lead from a primary corridor route running between the town of Estcourt and Oliviershoek Pass. Tertiary corridors are identified to lead into rural areas adjacent to the World Heritage Site.

The uThukela Tourism Development Plan completed in 2007 identified the following challenges and opportunities:

Challenges

In general terms, the tourism industry in the district is growing however; there is still room for improvement. Whilst the district prides itself with some of its prime attractions, it is not without its own challenges. Some of the challenges identified include;

- Tourism in the district is poorly organised. There is no district organisational structure in place.
- The working relationship between public and private sector is very poor.
- At a local government level, the training of Councillors and officials is very limited.
- The management of tourism in the district is not evenly managed across racial groups; there is an absence of active engagement of previously marginalised groups.
- There is a history of conflict regarding land ownership, conflict between land conservation bodies and communities.
- There is a lack of community based tourism initiatives. Tourism activity is largely generated by the resorts, and there are very limited linkages with rural communities.
- The district does not have a specific identity or marketable image.
- There is a lack of market research and strategic tourism planning for the district.
- The tourism infrastructure in the district is underdeveloped, the condition of the roads is very poor and there is very little signage.
- Tourism facilities in the district are not integrated.
- It is understood that the foreign tourists have in the past expressed their disappointment with the lack of high standard accommodation and a lack of high quality catering.
- Foreign tourists have also indicated that there is a limited range of facilities and activities available and the absence of a creative approach to develop the area a unique and exciting "African Experience".
- Cultural and historical attractions are not fully exploited for those who are not keen to active recreation.
- The increasing provision of time-share units has seen relatively low employment, as these relatively require a small number of workers to maintain them.
- The establishment of B&B's has a negative impact upon resorts and hotels. They are able to offer higher quality standard of accommodation to visitors at a cheaper price because they have lesser overheads.
- The prevalence of HIV/AIDS affects local communities and the industry, as there is a high level of absenteeism.
- The area is over supplied with caravan and camping sites. The problem is that these do not generate much income and job creation possibilities are very limited.
- The environmental impact of future tourism developments could undermine the natural beauty of the area. Recent environmental regulation requirements for environmental impact assessments are not easily accepted by developers.

- Tourism attractions are concentrated along the Berg whilst areas such as Indaka and uMtshezi Municipality are left with very little attractions.
- There is very limited access to credit for aspiring entrepreneurs.
- There is limited entrepreneurial capacity due to low levels of education amongst the majority of the rural population.
- The current political instability in certain parts of the district impacts negatively on tourism. This will further raise concerns around issues of safety and security which is a currently one of the major issues.

Opportunities

- The district's wide range of bio-diversity and its abundance of natural resources.
- The outstanding natural beauty of the Drakensburg, in particular that of the northern Berg which is less developed than the central Berg. This means there is potential for future developments.
- An opportunity exists to transform the uThukela tourism industry to one that is globally competitive, environmentally sensitive, and committed to socio-economic development of the rural communities.
- The international tourists tend to favour eco-tourism, cultural tourism, and adventure holidays and that provides an opportunity for specialised tourism development in uThukela DM. The developments should be designed to favour underdeveloped communities, and should be bear economic benefits and empowerment for these communities.
- The primary and secondary movement corridors provide an opportunity to integrate tourism developments in the district, and to link to link these with the rest of the Province and the country.
- Approximately 70 sites of San artefacts and rock paintings were identified in the mountains of Mnweni area. These offer an opportunity for a unique experience to visitors who are interested in cultural and archaeological heritage of the area.
- An opportunity exists to link traditional practices and cultural beliefs of the rural communities, to the living cultural natural landscapes of the area, and to develop these into unique tourist attractions.
- The district's abundance of cultural and historical assets, its association with the Anglo-Boer war, the headquarters of General Louis Botha (Easby Victorian House), battlefields, and battle cemeteries, the National Monuments, and Museums are all attractions.
- UThukela has significant built features such as the Qedusizi Dam, Spioenkop Dam and Wagendrift Dam which could be used to strategically locate upmarket developments, as well as for recreation purposes.
- The rural communities have vast talents which they are not exploiting to benefit them economically.

It needs to be noted that no projects have been implemented since the last tourism plan due to lack of financial resources. A list of projects identified through the previous tourism development plan can be accessed in Annexure 4. In keeping with the review of the previous strategy, it will be indicated if the challenges and opportunities are still relevant.

- **Economic Development Spatial Development Framework**

The uThukela Economic Development Spatial Framework illustrated below shows the potential for game framing and Battlefields in the area highlighted with a red circle. However, the LED only identifies the area highlighted in blue as tourism potential due to the UKhahlamba-Drakensberg Park.

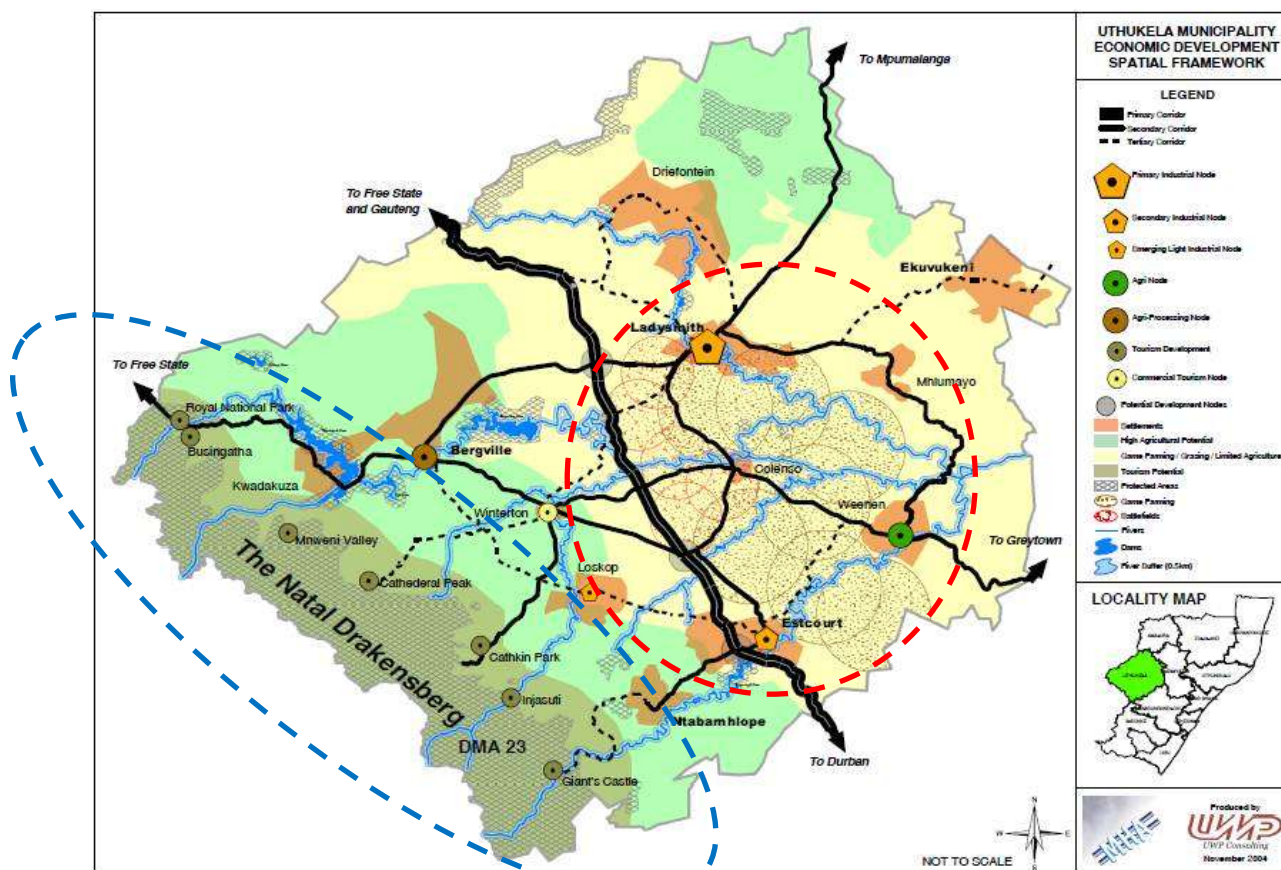


Figure 2 – uThukela SDF (Source: uThukela LED)

2.2 Situational Analysis

This section of the report provides an in-depth outline and review of the current status quo of tourism in uThukela District and the local municipalities which lie within its jurisdiction. The situational analysis forms a crucial background to tourism in uThukela with regard to the issues and challenges experienced and the current market supply and demand relating to tourism products available. This will in turn provide the basis for the tourism strategy, vision, goals, objectives and projects. The Situational Analysis is a comprehensive process by which various methodologies are used to obtain data. The agreement at the inception meeting was to produce a precise and logical report and this will be carried through throughout the report.

The outcomes of the Situational Analysis are:

- | | |
|--|---|
| • Spatial/Economic and Environmental Analysis | ✓ |
| • Tourism Market Supply Analysis | ✓ |
| • Tourism Market Demand Analysis | ✓ |
| • Institutional Analysis | ✓ |
| • SWOT analysis providing information on the destination's competitive position. | ✓ |

2.2.1 Spatial–Economic Analysis

UThukela District Municipality is one of ten District Municipalities in the Province of KwaZulu-Natal. It was established during the 2000 transformation of local government. UThukela District Municipality derives its name from one of the major rivers in the Province of KwaZulu-Natal, the

UThukela River that rises from the Drakensberg Mountains and supplies water to a large portion of KwaZulu-Natal as well as Gauteng. UThukela District Municipality is bordered by three district municipalities within the Province of KwaZulu-Natal, namely Amajuba, UMzinyathi and UMgungundlovu. These districts have varying tourism potential, the Battlefields Route is a famous brand for Amajuba and UMzinyathi Districts and UMgungundlovu is famous for the Midlands Meander route. This places uThukela in a favourable position as it is located in the midst of these district municipalities and passers-by are attracted. It would therefore make sense to advertise at well-known surrounding areas which draw tourists. The Locality Map below shows uThukela in relation to KwaZulu-Natal.

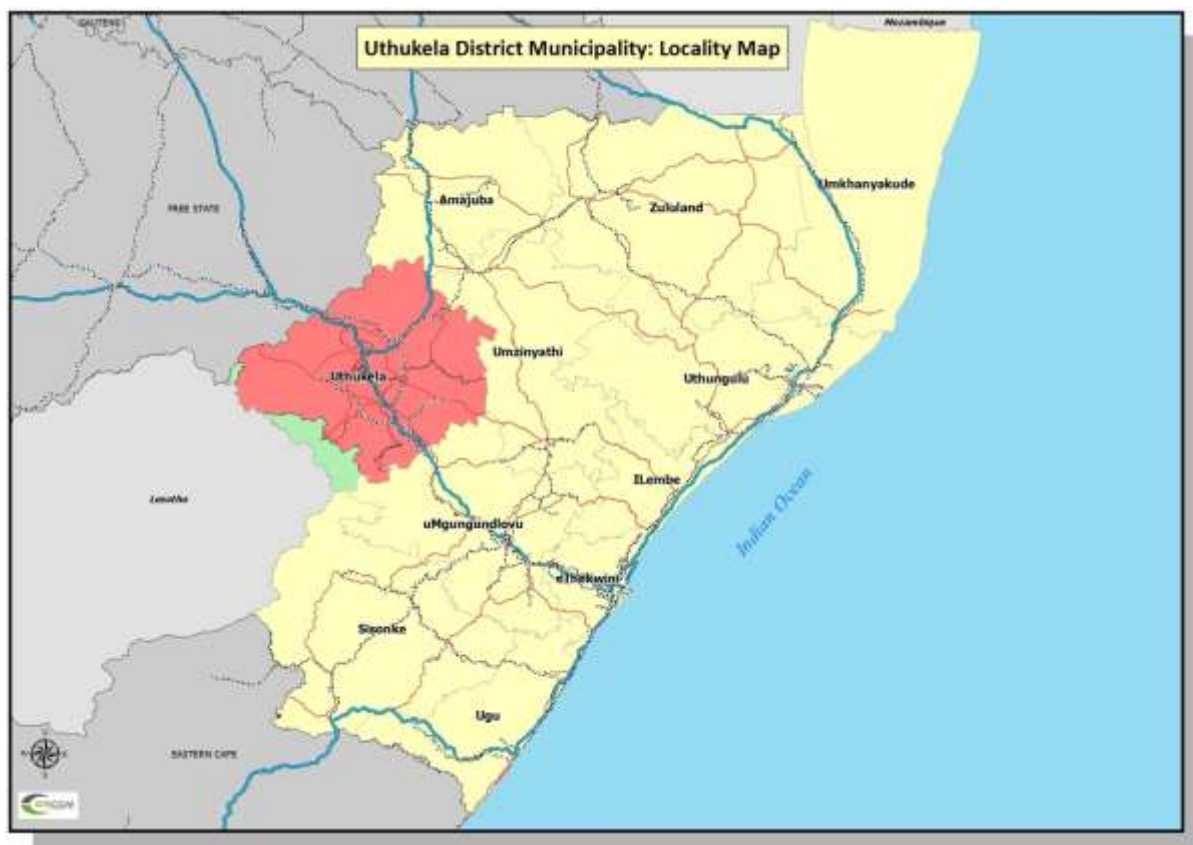


Figure 3 - UThukela District in Relation to KwaZulu-Natal (Source: GISCOM and UThukela GIS)

The district is also bordered by the Free State and has an international border of Lesotho which provides opportunities for cross border linkages which can prove to be very beneficial for tourism development. Existing cross border linkages exist with the Free State (Van Reenens Pass) and Lesotho through the Maloti-Drakensberg Trans frontier Peace Park.

The size of the Municipality is approximately 11500km² consisting of five municipalities namely, Indaka Local Municipality, Emnambithi/Ladysmith Local Municipality, UMTshezi Local Municipality, Okhahlamba Local Municipality and Imbabazane Local Municipality. Emnambithi is occupying 2,965.92km², Indaka is on 991.71km², UMTshezi 2130.85km², Okhahlamba which is the largest is on 3540.63km², Imbabazane is on 827.74km² and the DMA 23 is on 874.33km². This municipality is characterised by socio-economic indicators such as low revenue base, poor infrastructure, and limited access to services; low economic base; high levels of poverty, unemployment, skills shortage, lack of resources and low level of education; under-developed land and settlement patterns that make it difficult to plan for effective service delivery.

UThukela District municipality consists of five Local Municipalities with a former District Management area managed by KZN Wildlife. The District Management Area has been incorporated into the local municipalities of Imbabazane and Okhahlamba. The major economic hubs are Ladysmith and Estcourt, and other relatively small main towns being, Bergville, Winterton, Cathkin Park, Weenen and Colenso. According to the IDP review 2011/2012, 35 % of the district is tribal land. Indaka and Imbabazane are the two local municipalities which are predominantly made up of traditional land and are of a rural nature⁶. Tourism KwaZulu-Natal has sub-branded this area accordingly as the “Soul of the Zulu Kingdom”⁷.

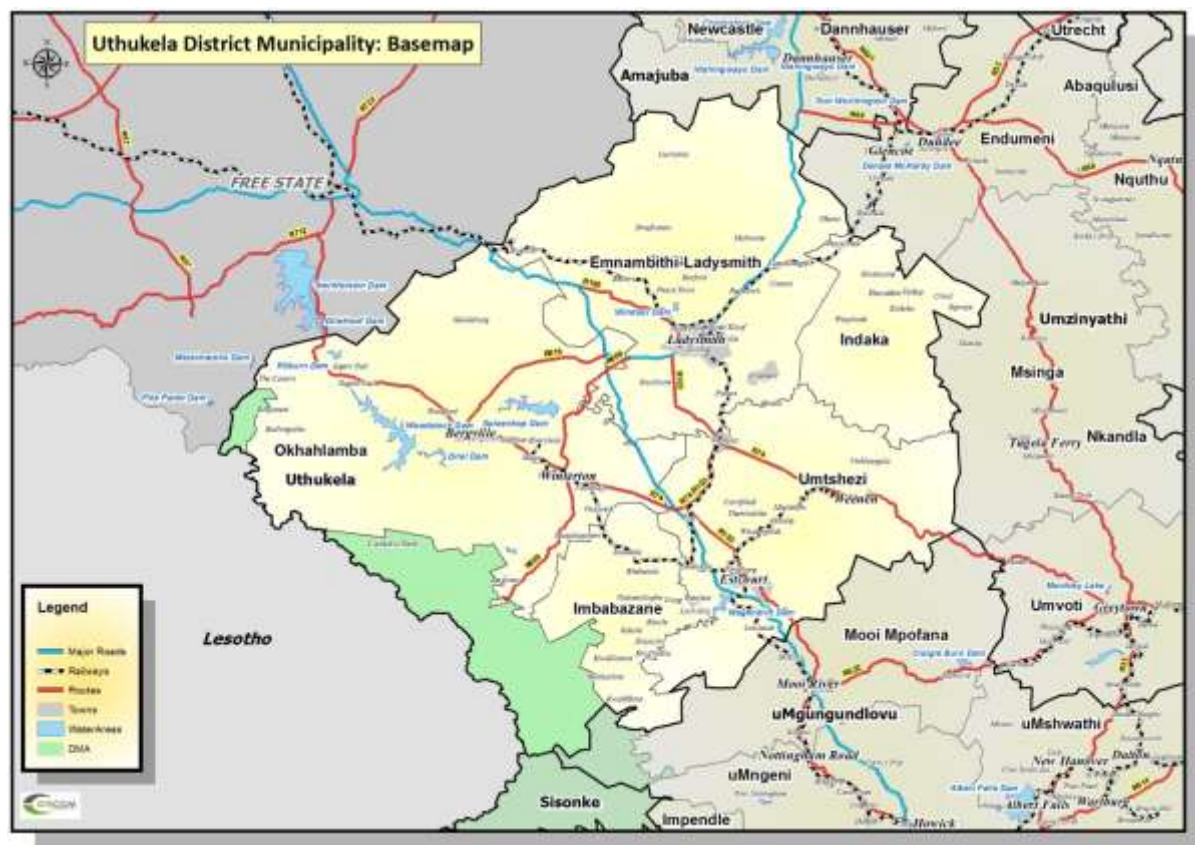


Figure 4 – UThukela District Municipality Base Map depicting the Local Municipalities in relation to the District (Source: GISCOM and UThukela GIS)

‘The district has a large number of tourism attractions linked to its relatively mild climate, fairly well developed infrastructure, well-established recreational tourism, an abundance of natural resources and intrinsic beauty and its location relative to the “Battlefields, Berg and Bush enhances the tourism opportunities in the district”⁸.

The map below presents the land ownership in terms of traditional land and state and private land.

⁶ See map of Land Ownership below

⁷ UThukela Tourism development Plan 2006

⁸ IDP review 2011/2012

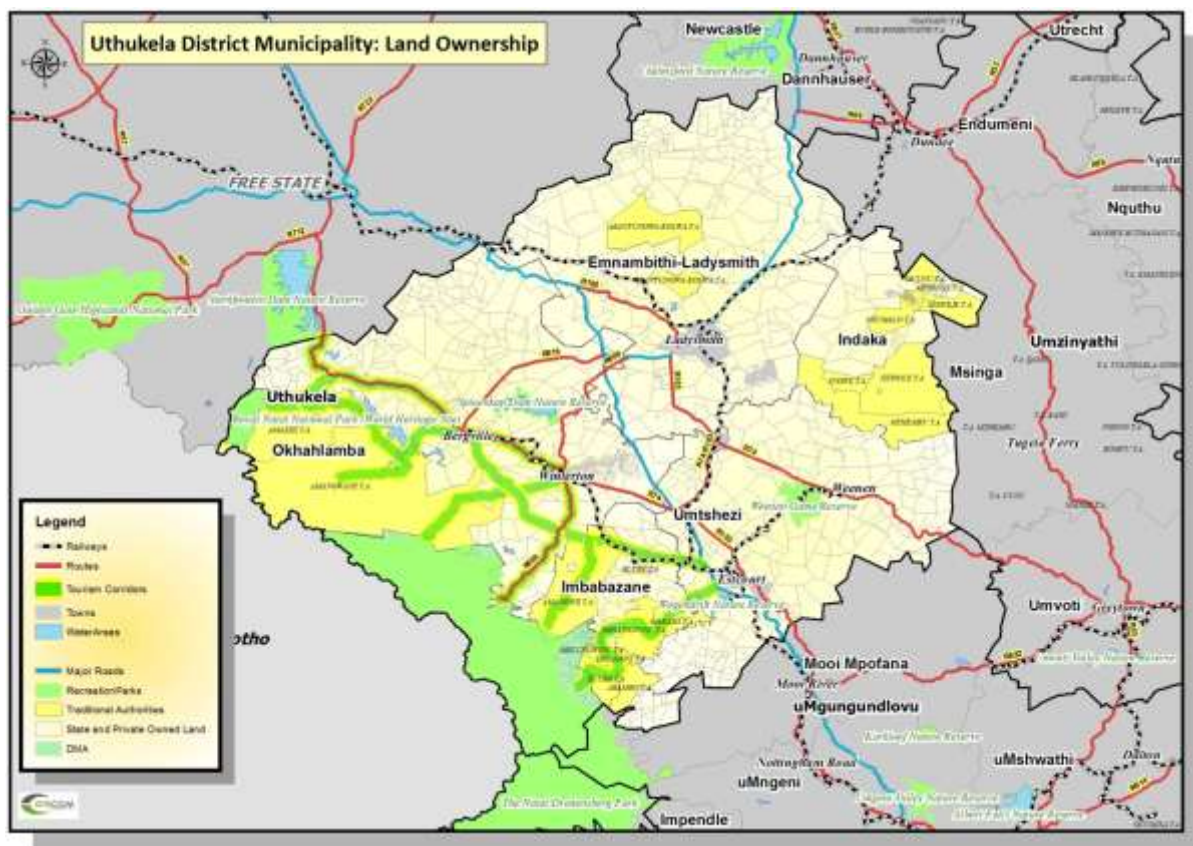


Figure 5 – uThukela District Municipality: Land Ownership (Source: GISCOM)

2.2.2 Tourism Structuring Elements and Linkages

UThukela is highly accessible and linked to both the provincial and national economic centres by well-established provincial and national road networks. Please refer to the base map above which depicts the road linkages traversing uThukela District. The N3 and N11 make uThukela an important entry point to the Province. The R74 is an alternative route from the Free State, and is an important tourist route linking the Drakensberg with the north coast of KwaZulu-Natal. The N11 links to Amajuba, the R74 links to Free State and the N3 dissects the district. Other important roads linking the local municipalities and towns within UThukela such as Escourt, Winterton, Bergville, Cathkin Park, Weenen, Colenso, and Ladysmith are the R616, R600, R602, R103 and R74.

These routes link the towns and service nodes of uThukela with the N11 and N3. The N3 is of inter regional importance, linking the major economic centres of Durban and Gauteng. The N11 is an alternative route from Ladysmith to Gauteng and Limpopo and forms an important route between Ladysmith and Newcastle located in the neighbouring Amajuba District Municipality. The N11 is currently being upgraded, which is hoped to spur development and a rail road junction⁹. The R74 provides a linkage to the N3 and N6 roads leading to the Free State.

The R74 from Bergville over Oliviershoek Pass through to the Harrismith/Bethlehem is currently in appalling condition and is seen to drive tourists away from the Drakensberg and therefore local tourism is under strain. The N11 is under construction and the process entails a stop and go method

⁹ IDP review 2011/2012

obliging passers-by to wait 20 minutes at each stop and go along the way. This discourages visitors into the area and creates a poor linkage to surrounding districts such as Amajuba.

Not only does uThukela have strong inter regional road linkages, but strong rail linkages as well. As seen from the Base Map above, there are existing rail lines and networks traversing uThukela. There is the Johannesburg-Durban electrified main railway line passing through uMtshezi, through Emnambithi to the Free State and Amajuba. The railway line also traverses Imbabazane and Okhahlamba LMs.

The strategic positioning with regard to the road and rail networks, poses a major advantage for tourism in uThukela as there is an influx of passers-by and trade taking place on a daily basis. The given linkages create great accessibility into uThukela which is imperative for tourism development.

According to the uThukela IDP, in line with Provincial Guidelines, tourism routes have been identified along the Drakensberg, linking areas such as Cathkin Park, Bergville, Winterton and the Northern Berg. The route has been expanded recently to include linkages to tourism nodes within the Drakensberg range. Secondary tourism corridors are identified to each tourism node in line with provincial draft policy identifying a trekking route along the World Heritage Site. These routes lead from a primary corridor route running between the town of Estcourt and the Oliviershoek Pass. Tertiary corridors are identified to lead into the more rural areas adjacent to the Drakensberg World Heritage Site connecting to primary and secondary tourism routes.

2.2.3 Economic Considerations

The total Gross Value Added output for the KwaZulu-Natal was estimated at ±R269 billion in 2010, while this figure was just over R 12.5 billion for the district in that year. UThukela district contributes 5 % of the total provincial GVA output and 5.5% of total employment in 2010 in the province. The direct relationship can be seen between GVA and employment, as the percentages correspond.

The table below presents the employment contribution and GVA contribution of each economic sector. The three highest contributors to output are, manufacturing with 21%, Finance and Business Services with 16%, and Wholesale and Retail Trade with 15%. Construction is the fastest growing sector with the highest growth rate over the five year period and Mining and Quarrying the shows the lowest growth rate which corresponds with provincial trends. It is interesting to note that Agriculture is one of the fastest growing sectors.

The highest number of people employed is in the wholesale and retail trade sector, followed by the government economic sector and the lowest employed by the Construction sector. With regard to formal statistics, statistics for the tourism industry are fragmented across various economic sectors and little coordination and collation of statistics exists. Therefore, with regard to formal statistics obtainable from economic databases, the category of 'catering and accommodation services' is most suitable and specific to the tourism industry.

Catering and accommodation contributed to 2 % of output of uThukela DM in 2010. 2968 people were employed by the 'Catering and Accommodation' sector in 2010, contributing 3% to total employment in uThukela. Important to note is that 'catering and accommodation services' has a negative growth rate together with manufacturing, electricity, gas and water as well as agriculture with regard to employment within the five year period. This indicates that the hospitality sector is under performing and with the recommended suggestions will foster more positive results in the future if carried through. As indicated by stakeholders and other statistics, Okhahlamba LM contributes the most to output in the Catering and Accommodation sector, followed by Emnambithi LM and Imbabazane and uMtshezi and Indaka with the lowest contribution to output of the catering and accommodation sector. The local municipality with the highest GVA output as shown by the

table below is Emnambithi lm followed by Okhahlamba LM, UMTshezi and Imbabazane with Indaka contributing the least to GVA output in 2010.

GVA Output (Rands per Million)	
UThukela District Municipality	12564
Emnambithi-Ladysmith Local Municipality	5467
Indaka Local Municipality	537
UMTshezi Local Municipality	2609
Okhahlamba Local Municipality	2747
Imbabazane Local Municipality	1174

Table 4 – GVA Output at basic 2005 prices (Source: Quantec)

The following table describes the contributions to GVA and employment by sector for uThukela DM.

INDUSTRY	Gross Value Added		Employment		
	Percentage contribution to GVA (2010)	Average annual growth rate (%)2005 – 2010	Employed number - 2010	Average Annual Growth Rate (%) 2005 – 2010	% contribution total employment
Agriculture, forestry and fishing	7%	9.75 %	8457	-8.98 %	7%
Mining and quarrying	1%	1.30 %	277	15.56 %	0. 2%
Manufacturing	21%	3.01 %	16643	-3.02 %	14%
Electricity, gas and water	3%	1.52 %	415	-3.88 %	0.4%
Construction	3%	10.64 %	7834	6.88 %	7%
Wholesale and retail trade	15%	6.30 %	25453	4.23 %	22%
Catering and accommodation services	2%	3.65 %	2968	-1.76 %	3%
Transport, storage and communication	14%	7.01 %	7502	7.44 %	6%
Finance, insurance, real estate and business services	16%	9.91 %	12396	7.66 %	11%
Community, social and personal services	6%	4.53 %	16976	1.88 %	15%
General government	13%	5.13 %	17288	5.78 %	15%

Table 5 - Percentage contribution and growth of GVA and employment by sector (Source: Quantec and Urban – Econ estimates)

2.2.4 Environmental Considerations

It is important to understand the environmental nature of uThukela as this is one of the main contributing factors to the noteworthy nature based tourism attractions which define uThukela DM. UThukela DM is dominated by environmentally sensitive areas which have protected and conserved at an International, National, Provincial and local scale. According to the UThukela District IDP Review 2011/2012, there is a range of environmentally sensitive areas within uThukela and include amongst others natural resources such as the important species sites, sites of intrinsic biodiversity value, watercourses and steep slopes. The greater central plateau and river valleys, such as the Sundays and Tugela River are some of the natural resources that should be protected. The most important environmental value associated with these valleys, are there value as catchments areas. There exists a Biodiversity regional Plan for uThukela DM, which needs to be taken into consideration when planning future eco and nature based tourism products. The map below depicts key conservation areas as identified through the Biodiversity Plan for uThukela. EIA Regulations exist which will assist for future development in terms of what activities will lead to Environmental impact assessment (EIA). This needs to be taken into consideration when projects are planned and proposed given that there is a great concentration of environmentally sensitive areas in uThukela,

and caution needs to be taken to not harm the environment or threaten the intrinsic value. Tourism needs to work in harmony with the natural environment in order to protect and capitalize on the benefits of nature based tourism which is seen as a core experience through the KZN Tourism Master Plan.

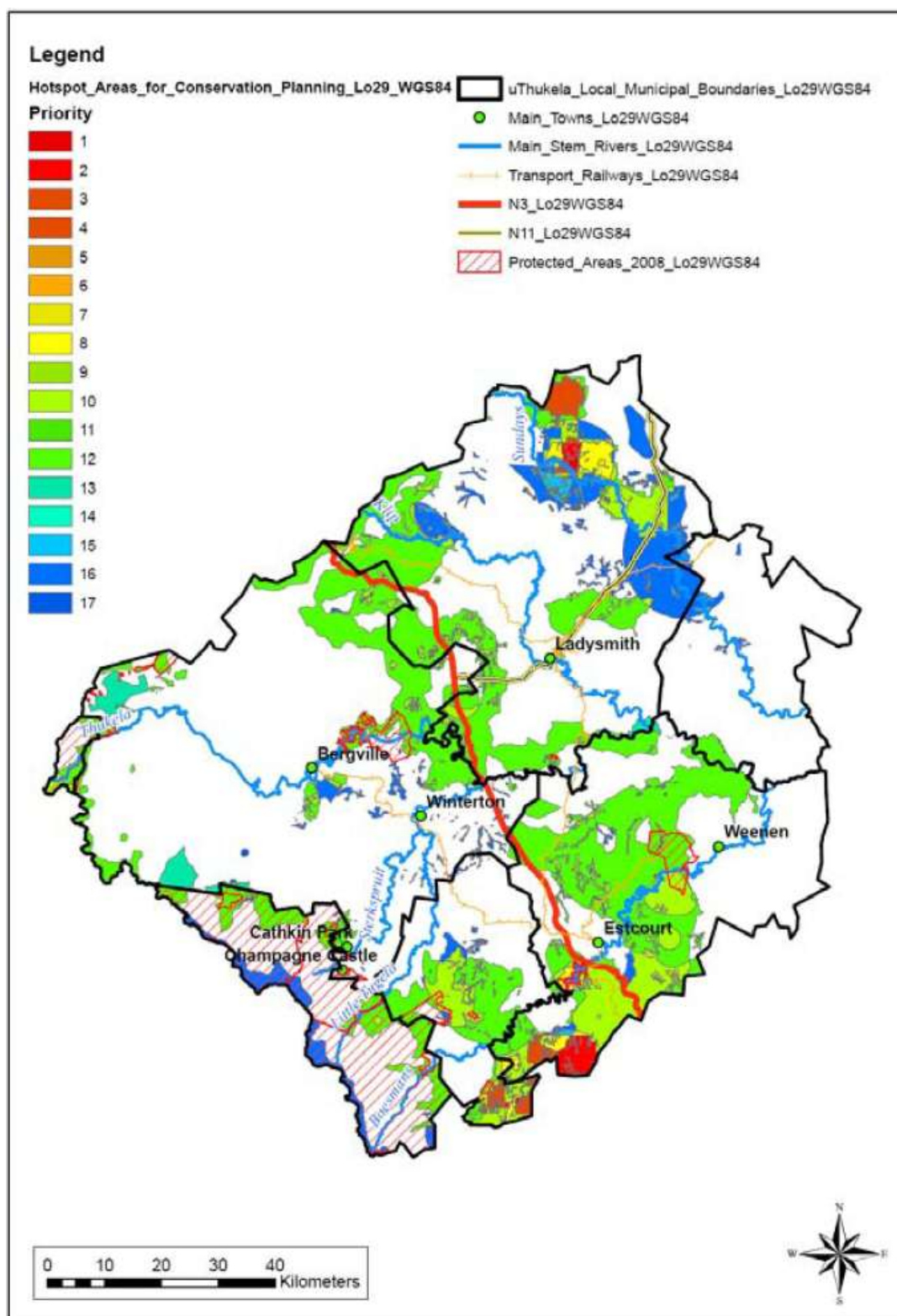


Figure 6 – Map showing key Conservation Focus Areas (Source: uThukela Biodiversity Sector Plan)

Environmentally sensitive areas are protected through organisations such as Ezemvelo KZN Wildlife which will be discussed in the following section of the report. Amongst the protected areas, special projects have been set aside for the conservation and nature based preservation of sensitive areas with intrinsic value which have an impact on tourism. The maps below spatially depict these important conservation/protected areas and major rivers (Tugela River). The Environmental Map below shows the environmentally protected areas which are the UKhahlamba-Drakensberg World Heritage Site Parks, the various water bodies (mainly dams). An explanation of the defining environmental features will now be discussed as they have a major tourism influence and need to be noted immediately with influencing tourism in UThukela District.

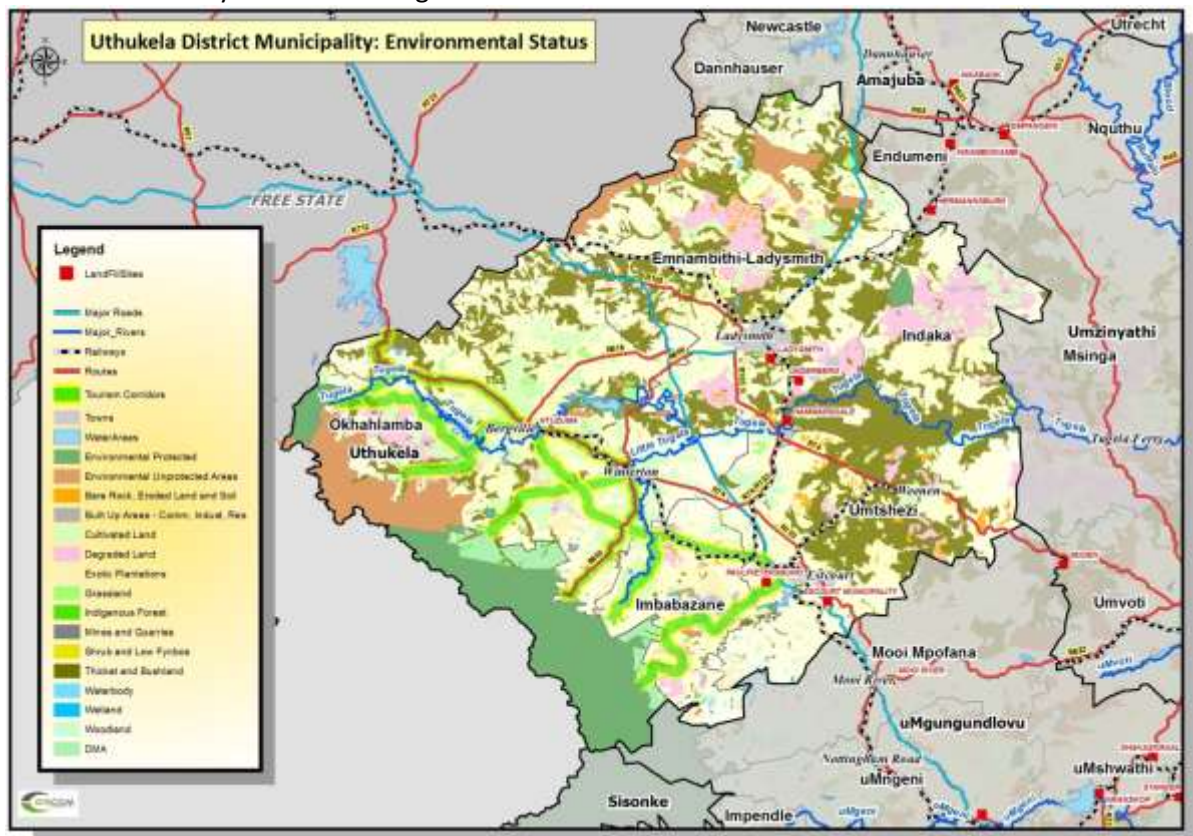


Figure 7 – Environmental Map showing Protected and Unprotected areas in uThukela (Source: GISCOM and UThukela GIS)

2.2.5 The main defining tourism features of UThukela

The main defining tourism features of UThukela are as follows and will be discussed individually;

- UKhahlamba – Drakensberg World Heritage Site
- Ezemvelo KZN Wildlife Areas
- Maloti Drakensberg Trans Frontier Programme/Route
- Drakensberg Experience Route
- Battlefields

2.2.5.1 UKhahlamba – Drakensberg World Heritage Site¹⁰

¹⁰ Refer to Annexure 5 for a list of the passes traversing the uThukela

The Drakensberg World heritage site spans a vast amount of tourist attractions and a range of tourist experiences ranging from eco and nature tourism, heritage and cultural tourism to arts and culture, adventure and sport as well as avi-tourism. It is world renowned and therefore is one of the major contributing elements to tourism in uThukela and should therefore be focused on. UThukela District has been demarcated in one of the most favourable tourism designations in KwaZulu-Natal for it has the likes of the UKhahlamba – Drakensberg World Heritage Site. UThukela is just one of the district municipalities within which the World heritage site falls under together with Sisonke and UMgungundlovu. This world renowned attraction draws tourists from all parts of the world, and from South Africa. The attraction can bring much exposure for the district and benefit the local surrounding underprivileged, mostly rural communities. It is the duty of the LM and DMs which administer the site to ensure the utmost protection and preservation of the site. This includes controlling development so that it does not put any pressure on / or harm the surrounding natural environment. Municipalities should be wary of the development taking place at the foothills of the Drakensberg and areas nearby, so as to not undermine the integrity of the World Heritage Site and its natural ambience. The park is managed by Ezemvelo KZN Wildlife.

There are a list of zones which the Heritage site comprises of, according to the Special Case Area Plan the proposed Special Case Area comprises of the uKhahlamba- Drakensberg Park, The Buffer Zone, Development Nodes, The Resource Conservation Zone, The Agricultural Zone, International Access Corridors, View Corridors, Settlement Nodes, Settlement Nodes and Settlement Nodes in the Buffer Zone¹¹. The Drakensberg Buffer Zone Committee is ensuring that the uKhahlamba Drakensberg Park World Heritage Site subzones are taken into cognizance in order to maintain the integrity of the uKhahlamba Drakensberg Park World Heritage Site as a Tourism site. According to research conducted by Tourism KwaZulu-Natal, 32% of KwaZulu-Natal's foreign air arrival market primarily visited the Drakensberg and 7% the Battlefields. This supports the fact that the Drakensberg is becoming a more popular destination for foreign tourists than was the case in previous years. This could be due to the Drakensberg being more aggressively promoted since it was declared as a World Heritage Site.

The extracts below describe the UKhahlamba-Drakensberg World Heritage Site and what it has to offer.

The UKhahlamba-Drakensberg World Heritage Site, one of two in KwaZulu-Natal and one of 8 in South Africa. Unesco (United Nations Educational, Scientific and Cultural Organization) declared the uKhahlamba Drakensberg Park in KwaZulu-Natal a World Heritage Site in 2000 and forms the western KwaZulu-Natal Border between South Africa and Lesotho. The park is 240 000 hectares large. There are 30 000 painted images in 520 rock shelters and many experts use the area to study the history of the people who painted the pictures. Most of the paintings were made about 4 000 years ago by the San people. The uKhahlamba Drakensberg Park was declared a World Heritage Site because it is the largest group of rock paintings south of the Sahara Dessert in Africa and because so many different subjects appear. The site satisfied three cultural and four natural criteria in becoming a World heritage Site. There are in total 296 bird species and 2153 plant species. There are a host of animals and insects available as well, including 44 dragonfly species, 74 butterfly species, 124 frog species, 23 lizard and 25 snake species as well as 46 species of millipedes and centipedes. Animals include eland, water buck, Oribi, leopard, redbok, jackals and mountain reed buck. Activities offered within the site include, walking, hiking, climbing, ice-climbing, bird watching, fly fishing, paragliding, mountain biking, hand gliding, horse riding, river swimming, rock art viewing and picnicking. Accommodation offered include 700 beds inside the park, 2000 closely adjacent, 9 campsites, 150 caves, picnic sites and view sites. The Drakensberg is also home to the **worlds second highest waterfall, Tugela Falls.**(All information taken from TKZN Stats Brochure 2011)

¹¹ Extracted from the Okhahlamba Spatial Development Framework 2010 Review

The extract below taken from the Okhahlamba SDF sums up the experience of the Drakensberg which applies directly to uThukela as these are the tourism experiences.

As the Drakensberg is approached by road one becomes aware of the interesting combination of cultivated farm lands, country villages, farm homesteads, expansive rolling plains, dams and watercourses with spectacular views through clean fresh air. In the middle distance the picture gradually changes to winding valleys, grassy spurs, indigenous forests and swift clear streams with numerous waterfalls leading up to the Clarens Sandstone. Above it the Highland sourveld grassveld dominates, containing extensive varieties of flowering plants to finally end abruptly in the High Berg- a gigantic wall of basalt averaging approximately 3 000m above the sea forming a dramatic barrier with a few difficult access routes to the Lesotho Plateau. Harmonising hues in a variety of tones and tints effectively integrate these elements to create an incredible picture in the mind of the sensitive observer upon which further elements might be added to culminate in the full experience of a visit to the Drakensberg Mountain Range.

The stimulating climate, changing light values, calm water summer days, sudden heavy summer storms, frequent winds, mist and icy winter temperatures enhanced by spectacular snowfalls all comprise the fascinating character of the Drakensberg throughout the year. In relation to the mountain range the country villages of Bergville, Winterton, Himeville, Underberg, Swartberg and Matatiele situated in the Approaches have a special rural quality, which reinforces the overall character of the region adding to the detached atmosphere of the Drakensberg from the busy urban and metropolitan areas elsewhere. In all, the Drakensberg Approaches retain a high level of environmental quality, thus proving to be an important resource in its own right. This further emphasises that the Drakensberg Approaches are an integral and important component to the full Drakensberg experience as the mountains themselves.

Recreational accommodation based on the natural recreation resources of the region to include private development, consist of:

Hotels, Guest Farms, Houses, Cottages, Chalets, Caravan Parks, Camping Sites, Overnight Huts and; Day Facilities

Some of these facilities occur in game reserves, nature reserves and State Forest areas, while most occur on privately owned property. Preliminary results from The National Recreation Study show 70 percent of recreation accommodation development in the region occurs on private property.

It can be generally found that a combination, or any one, of the following reasons might apply especially to the conservationist and recreationist:

Water production, Natural Beauty, Viewing Elements/ Dynamic Scenery, Historical, Ecological- flora and fauna, Geological, Archaeological, Serenity, Relaxation, True Wilderness Experience, Solitude, Spiritual, Country Atmosphere/ Clean Fresh Air, Physical Experience- endurance survival, Education, Retreat from urban environment, Trout fishing

The developer on the other hand realizes the economic potential of the area with regard to its attraction for recreation and uses these inherent qualities to increase his investment in the short-term as compared with the conservationist's long term strategy of protecting the resource for posterity

2.2.5.2 Ezemvelo KwaZulu-Natal Wildlife Areas

'Ezemvelo KZN Wildlife protects and promotes nature conservation in KwaZulu-Natal and ensures biodiversity conservation, wise and sustainable use of natural resources, creation and management of partnerships between stakeholders and communities and the provision of affordable eco-tourism destinations within the province. Ezemvelo is responsible for the management of approximately 100 protected areas in the province. Ezemvelo has recently broadened its areas of focus and begun to target the communities living and working adjacent to the protected areas, in terms of job creation

and the sustainable harvesting of natural resources'. Ezemvelo KZN Wildlife administers many nature and wildlife sites in uThukela which are listed in the table below:

Local Municipality	Attractions
Imbabazane LM	<ul style="list-style-type: none"> • Giants Castle • Garden Castle
Okhahlamba LM	<ul style="list-style-type: none"> • Royal Natal National Park • Spioenkop Nature Reserve • Monks Cowl Nature Reserve • Didima
Emnambithi LM	<ul style="list-style-type: none"> • -
UMtshezi LM	<ul style="list-style-type: none"> • Wagendrift Nature Reserve • Weenen Nature Reserve
Indaka LM	-

Table 6: Attractions administered by EKZNW (Source: Urban-Econ)

2.2.5.2.1 KZN Stewardship Programme

This is a National model to secure biodiversity on private/communal land. There is a current initiative aimed at linking the area between the Royal Natal National Park and Cathedral Peak. EKZNW is working with two Amakhosi, the Amazizi and Amangwane in order to create a community conservation area and two nature reserves. Two management plans exist for the traditional areas. This initiative will have immense implications for tourism development, and is envisaged to open up major potential tourism opportunities. It will also link to the Trans-Maloti Trekking trail. This initiative is imperative to be taken into account in the uThukela District Tourism strategy as it falls within the municipal boundary and has direct influence on future tourism development. UThukela should play a support role in restoration and sustainable land use management. Access should be improved and infrastructure placed. The Upper uThukela has immense tourism potential and the land is in good condition, however, the lower parts are degraded and over grazed. UThukela should explore avenues to get involved in this process. The Amakhosi are in the process of applying for land tenure rights to the traditional land which will make the process of dealing with land much more efficient, which has implications for the district as this will ease the process of communication.

Initiatives to be taken into consideration are:

- **Royal Natal Hotel:** this building is in derelict condition and has been identified by some as needing to be and re-built. EKZNW (who owns the hotel and manages the UDPWHS) have previously identified the possibility of establishing a joint venture with neighbouring communities to run a hotel/lodge. A full EIA has yet to be undertaken and a thorough financial viability study would be needed given competing existing and planned tourism establishments in the area.
- **The upper uThukela:** has been identified as priority by the Biodiversity Sector Plan for uThukela. This is seen as a possible community owned expansion of the WHS, with associated opportunities for tourism. In order for the area to function with the planned nature reserve, infrastructure is needed, including improving road alignment and erosion control, field ranger outposts, fencing. Potential is seen for accommodation facilities such as a lodge/small hotel.
- **Linkages with surrounding areas:** there are plans at Sterkfontein Dam Nature Reserve which involves massive tourism development ('Mantatisi', funded by their provincial government). This is an opportunity, but will also be a competitor for market share in uThukela DM. There is a community hotel being upgraded at Witsieshoek (northern boundary of Royal Natal in the FS). There are opportunities and discussions taking place to establish a community conservation area on the northern boundary of Royal Natal section of the UDPWHS, extending

in the long term possibly as far as Golden Gate Highlands National Park. It is also envisaged linking Royal Natal to Sterkfontein Dam and a contractual park, with associated business opportunities.

- **Ngelegele Community Game Reserve** situated between Draydott and Giants Castle is envisaged by the iNkosi as an eco-tourism destination. Some planning has taken place but there is now a need for road infrastructure, fencing and accommodation facilities such as a lodge development. EKZNW supports this initiative and would donate game and would, as a partner, provide management advice.
- **Expansion and consolidation of Weenen Game Reserve** - there exists an opportunity to expand and consolidate the Weenen Game Reserve with adjacent community land (Mthontwane). There is limited infrastructure within community land and a concept and business plan for tourism development in the area needs to be undertaken together with facilitation of public meetings. Aid is also needed with the purchasing of game for the reserve to the value of R 1.4 mil (money can be loaned and paid back from income from tourism and hunting as an option) EKZNW is a partner with the Community Trust on this project, and would drop the western fence of Weenen Game Reserve to create one larger nature reserve with greater tourism potential (the closest place to Durban to see black rhino and good numbers of white rhino and hopefully buffalo).
- **The restoration of Umsuluzi Game Reserve near Colenso** - this community owned game reserve is in need of restoration, including fence repairs and road maintenance. The Trust requires financial and business advice. Previously EKZNW has aided the community with game donations and management advice, and fully supports this project. If successful, this area could contribute towards the larger Weenen-Mthontwane-Umsuluzi nature reserve, which would then be approximately 12 000 ha and therefore a significant tourism establishment. There are opportunities to purchase additional land or enter contractual arrangements with other landowners to create a larger ecotourism business.

2.2.5.3 Maloti Drakensberg Trans Frontier Conservation Area

An important feature of the Drakensberg World Heritage site is the strategic location on the border of Lesotho. This provides various opportunities for international integration with Lesotho to achieve sustainable development of the countries. This linkage has immense opportunity for tourism in South Africa and Lesotho, and therefore uThukela District. This key feature has prompted the formulation of a cross boarder programme, The Maloti-Drakensberg Trans frontier Programme. The UKhahlamba-Drakensberg World heritage site together with the Sehlabathebe National Park in Lesotho has been combined into a Trans frontier Park. A cross cutting project which integrates South Africa with Lesotho through uThukela District, is the Maloti Drakensberg Trans Frontier Route.

'The Maloti-Drakensberg Trans frontier Conservation and Development Project (MDTP) is a five year World Bank funded intervention (2003 – 2007) that seeks to establish a framework for co-operation between Lesotho and South Africa in order to ensure the protection and sustainable use of the natural and cultural heritage of the Maloti-Drakensberg Mountains for the benefit of present and future generations. The main objectives of the project are to conserve globally significant biodiversity, while contributing to community development through facilitating sustainable livelihood opportunities which would include nature-based tourism, improved agricultural practices, land-care strategies and the new concept of the payment for environmental services'¹².

It is important to note that the Maloti Drakensberg Trans frontier Programme (MDTP) functions through bilateral agreements between SA and Lesotho with the focus being mainly the Trans frontier

¹² <http://www.sanparks.org/conservation/transfrontier/maloti-drakensberg.php>

Conservation Area for conservation and a much broader area for tourism (The Maloti Drakensberg Route). The MDTP is not an authority per se but a facilitation entity for Trans frontier conservation and tourism actions that are required within strategic planning. The MDTP is funded by national and provincial organs of state in South Africa and Lesotho and reports to a Bilateral Coordinating Committee (representatives from both countries)¹³.

- **The Maloti-Drakensberg Route (MDR)**

The Maloti-Drakensberg Route is an exciting example of collaboration to grow tourism across international and national boundaries. It is an initiative bringing together tourism operators in South Africa and Lesotho to increase benefits to the people of the region. The route was launched by the Ministers of Environment for the two countries and has grown from strength to strength.

Information provided by a key stakeholder of the Maloti-Drakensberg Trans Frontier Programme provided the following information on the route. The Maloti Drakensberg Route is essentially managed (intellectual property rights to the brand are owned by them) by a Destination Marketing Organisation called the Maloti Drakensberg Route Forum which has a constitution and to whom funds from the Maloti Drakensberg Trans Frontier Programme are allocated for agreed to tourism marketing initiatives. It is a member based Non-Profit Organization much like the Midlands Meander but with a much larger destination marketing mandate for jurisdictions of Lesotho and the Alpine areas of Free State, KZN and the E/Cape.

The Maloti Drakensberg Route (MDR) is a pivotal conduit for tourism activity falling within the Northern Drakensberg (as well as the entire UKhahlamba-Drakensberg destination area). The MDR is an internationally formalized tourism development arrangement via Bilateral Agreements between the Tourism Ministers of Lesotho and South Africa.

UThukela district together with the MDRF can resolve to effective destination marketing functions carried out on behalf of the UDM/local product owners who are members of the MDRF. This needs to be done through the functionality of the MDR (through the constituted Maloti Drakensberg Route Forum (MDRF). This will allow uThukela great opportunities for tourism by becoming involved in this initiative. A suggestion is that product owners in the Northern Drakensberg area of uThukela be encouraged to join the Maloti-Drakensberg Trans Frontier Forum in addition to their own CTOs. The Maloti-Drakensberg Route is envisaged to be South Africa's largest and primary Alpine Tourism Route/Destination.

This initiative could provide for the formulation of other routes that can eventually be linked to the Maloti-Drakensberg route. Tourism KwaZulu-Natal is an active partner in the MDR initiative. UThukela District needs to become actively involved in this initiative together with local product owners.

- **Proposed Tourist Corridor In UKhahlamba – Drakensberg: Trans-Maloti Trekking Trail**

This initiative is seen to have immense tourism impact as well as socio-economic and environmental impact on the surrounding areas. It links Southern Drakensberg, Northern Drakensberg, Lesotho and the Free State. EKZNW, SANParks and the KZN Department of Cooperative Governance and Traditional Affairs have a vision of creating a 'trans frontier trekking route', linking Golden Gate in the FS, through Royal Natal, upper uThukela, the southern portion of the UDPWHS and ultimately to the Mehloteng Hiking Route in the Eastern Cape, with a parallel route at the top of the escarpment in Lesotho. This would have significant job creation opportunities associated with trail building and

¹³ As indicated by the Maloti Drakensberg Trans Frontier Programme tourism Specialist

maintenance, home stays, porters etc. This project is supported by the National Department of Environmental Affairs (who could facilitate funding) and the Maloti Drakensberg Trans frontier Project. Discussions regarding border control procedures are already taking place with Lesotho. Detailed planning and a feasibility study is needed. Establishment of this trekking route, which will be internationally recognised, would facilitate the establishment of many micro-enterprises in rural communities.

2.2.5.4 Drakensberg Experience Route

This route is a cross cutting initiative between various local and district municipalities. The Drakensberg Experience is located in the Midlands of the KwaZulu-Natal province of South Africa. The route is centred on the Drakensberg World Heritage Site, which includes Giant's Castle and the Central and Northern Drakensberg. The route extends from Hidcote in the south to Sterkfontein Dam in the north, including towns such as Estcourt, Winterton, Bergville, Weenen and Geluksburg, and covering the area up to but not including the towns of Colenso and Ladysmith. The main stakeholders include N3 Gateway, Bushman's River Tourism Association and Open Africa.

2.2.5.5 Battlefields

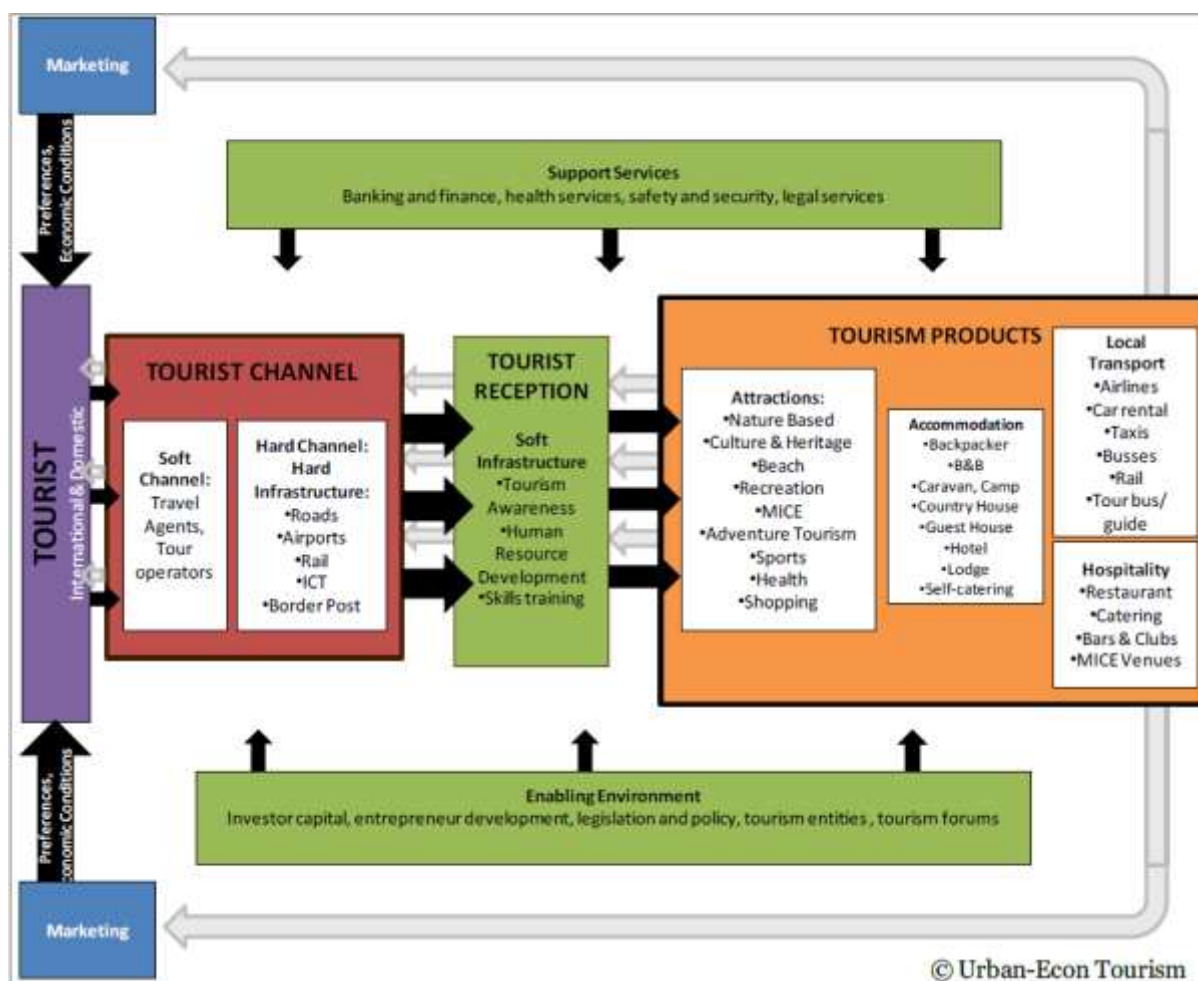
Please see below for a detailed description in section 2.6.1 below.

2.3 Tourism Market Supply Analysis for uThukela District

The tourism industry represents the group of products and services provided to the tourist. It is important to recognise that the tourism industry needs to act as a system in order to function efficiently. Tourism development within the district therefore needs to create forward and backward linkages between the tourism products and other tourism products, and between tourism products and supporting services. All elements of the system need to be in place for the tourism sector in KZN to operate as a whole. This section of the situational analysis will be carried out in accordance with the figure below. This figure represents the systematic process of tourism development. This tourism system aids one in understanding the process within which tourism takes place and provides a comprehensive breakdown of all the components involved. The diagram illustrates an iterative process with one component of the systems co-dependent of the next and therefore has to work together in an integrated manner in order to function as a whole. The diagram below therefore outlines the Market Supply Analysis and the following topics will be discussed in order to gain a thorough understanding of tourism in uThukela and to culminate in a comprehensive analysis informing and forming basis of the forth coming strategy.

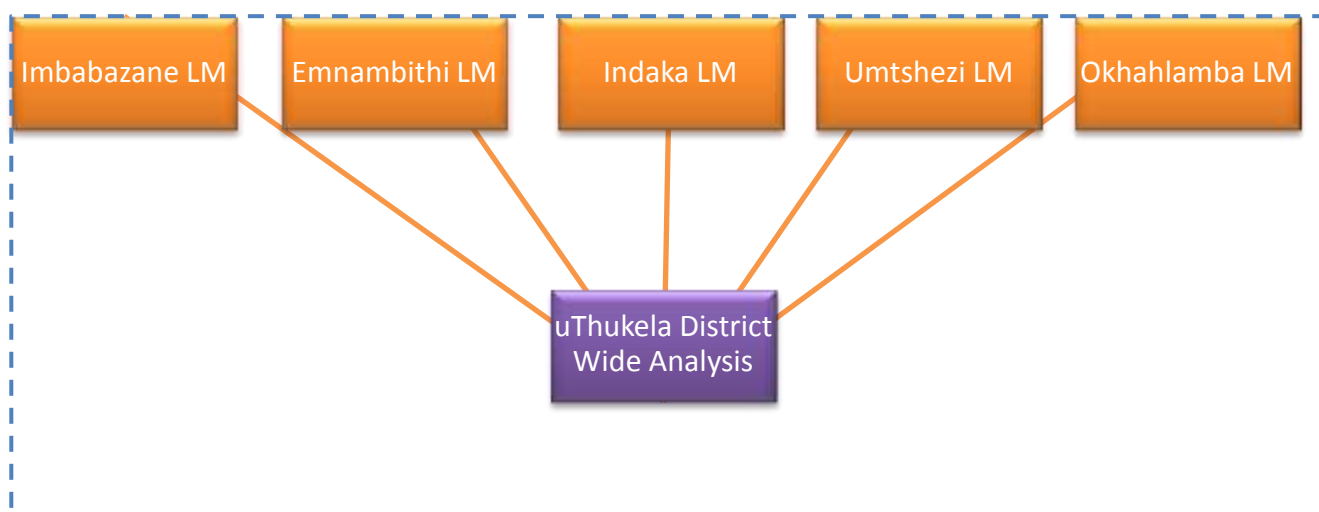
In essence the municipality should be aware of the need for all the tourism products identified in the supply analysis and take a proactive approach to ensuring that the 'visitor demand' is matched by the 'supply'. In order for this to be done, an inventory of tourism products within uThukela needs to be provided as comprehensive as possible. In order for a comprehensive analysis to be undertaken, each local municipality is analysed individually, before analysing the district as a whole.

An inventory of tourism products identifies the opportunities and constraints that a local municipality has in attracting visitors to their town/ city/region. The number and range of attractions and activities, things visitors can see and do, are particularly important. Gaps and/or oversupply in the product range and/or poor quality facilities will make places less attractive to visitors. In the same way lack of transport and accommodation will deter visitors from travelling to and stopping at the destination. Until an inventory of attractions, activities, accommodation and transport has been completed and this is matched with an understanding of visitor demand and visitor satisfaction, destinations will be unsure whether they are meeting Visitor expectations. In terms of prioritising tourism requirements, the attraction and activity sectors are the key areas. Visitors come to South Africa 'to see game and places as well as to experience the local way of life. The attractions sector provides this opportunity. Local government is often also, a key provider of visitor (and residents) attractions and amenities.



- **Structure of Tourism Market Supply Analysis**

The Tourism Market Supply Analysis moves on to review each of the five local municipalities in relation to the municipal strategies, and consultation results. The reason for this is the aim of fully understanding each local municipality that contributes to the district individually and then to attempt integrating results to form a district wide supply analysis. Each local municipality review of tourism products concludes with a S.W.O.T table, detailing the key issues and strengths. The market analysis then goes on to provide a summary of the tourism products (in terms of attractions, accommodation/hospitality and support services) at a district level. The market supply analysis then goes on to discuss marketing.



2.3.1 Local Municipality Supply Analysis

2.3.1.1 Indaka Local Municipality

Indaka Local Municipality is isolated from the N3 and N11 National movement routes which link the district to surrounding district, and local municipalities. However, the provincial roads linking Indaka to the National routes are the P191, P349 and the P36. Indaka is characterised by dispersed traditional settlements. The most important river systems in the Indaka municipality are the UThukela, Sundays and Wasbank Rivers. However there is serious land degradation due to miss management. Land is mainly governed by Ingonyama Trust, which may hinder private development. The main settlements are Ekuvukeni and Limeville Complex. Internal linkages are poor between settlements. The area is characterised by low levels of basic services including economic and social facilities with land reform being the major issue. Agricultural potential is limited and little agriculture is practiced.

According to the draft IDP 2011/2012 review, Indaka;

- Since Indaka is perceived to have little investment opportunities without a sound economic base, the LED suggests that the municipality create an enabling environment.
- Surrounded by LM such as Emnambithi, UMTshezi, Endumeni (Battlefields Route), which have immense tourism potential.
- Previous investigations of the area have identified potential for development of arts and crafts, game farms, tourism
- The Cannalibism route is a major focus in the LM
- Lack of natural resources, lack of revenue and its distance from any major tourist routes.
- The IDP identifies tourism as a key economic sector which, along with agriculture could foster economic development by capitalising on the Battlefields Route due to its provincial significance.
- The IDP states that Indaka also hopes to stimulate SMMEs through the tourism sector along with others
 - A challenge identified with regard to tourism is that the LM has to compete with established tourism attractions and destinations such as Battlefields and

Drakensberg and other challenges that exist are that there are no large scale attractions, limited funding, and mitigating factors such as the rural Nature, political strife and crime.

- Opportunities as cited through the IDP are the linkages to existing tourism routes, promotions through KZN Tourism, and development of unique local tourism for the ceremonial/wedding market.
- Key threats identified through the IDP include lack of infrastructure development to sites, securing funding for projects, lack of market potential to sustain the tourism sites developed

Tourism feasibility was conducted for Indaka and the outcomes are as follows.

○ **Cultural Village and traditional ceremonies**

The potential exists to develop areas with rich cultural activity such as Umemulo, traditional weddings, traditional courts and religious ceremonies. Mhlumayo, located near the Tholeni River bank. An additional local tourism site has been identified in Tholeni (Ward 3) where residents of Indaka and the living in Emnambithi gather for wedding photos, traditional celebrations, in particular “umemulo”. In Ward 7 the community wishes to set up a cultural village adjacent to the cannibalism site which will have, amongst others, an area for displaying arts and crafts. Activities envisaged include:

- Sangomas could be available to read fortunes and throw their bones;
- traditional dancing could take place on designated days for guests; and
- the establishment of a cultural village with a B & B near the caves

○ **Arts and crafts**

Indaka residents are generally highly skilled in producing beads, traditional hide skirts, grass mats and containers. This skill is also valued highly by local residents. In Ward 3 at a site near the Tholeni River which presently has no infrastructure but scenic beauty it is proposed that the following be developed:

- A Picnic site with braai and toilet facilities
- A small arts and crafts centre focussing on the provision of traditional celebration clothing and articles, which may urban residents do not have the time to make.

○ **Cannibal caves**

A site at Illenge Mountain house is believed to have been inhabited by cannibals during the last 100 years. Indaka residents perceive this to be an asset to the area. Access to the area needs to be improved in order to develop the site as a tourism attraction. The development of the Cannibalism route has been identified as the priority project within the Spatial Development Framework Plan. A feasibility for this routes has been undertaken, however, there has been difficulty in receiving funding for the project business plan. A site at the Illenge Mountain (in Ward 7) approximately 55km from Ladysmith has been identified as a potential tourism site based on previous cannibalism activities in caves located on the mountain.

○ **Sports and recreation**

Indaka residents are devoted soccer players and the community believes that the establishment of a sport centre in the area could attract South African tourism to the area. Due to lack of transport infrastructure and the cost thereof, these facilities are not accessible to the community at large. In the rural areas most of the schools have very basic sport facilities such as a levelled area for soccer, netball and athletics. Adult sport facilities are non-existent and therefore sport and fitness enthusiasts rely on the school facilities.

The corridor from Pomeroy to Majaqula attempt to link Indaka with areas across uMzinyathi and have potential to serve as major tourist access routes to the Zulu Culture and Heritage Route. Both the LED and IDP highlight the potential tourism projects.

The most current tourism projects identified by Indaka LM are listed below.

- Ilenge Cannibalism Route: This is the place where Cannibals who are alleged to be humans who ate other humans used to stay. The Municipality has listed the place to attract tourists to come and view
- Etholeni Park
- Makhasi Park
- Game/Nature Reserve
- Mjindini Arts and Craft Centre :This is the place built by the Municipality in ward 9 for women to knit all the traditional attires and display them for tourists. It also involves serving of traditional food as well as traditional cutlery
- Sigweje Arts and Craft Centre
- Sahlumbe Arts and Craft Centre

The 2011 LED suggests that a crucial aspect for initiating tourism development in Indaka is the development of the tourism sector strategy. The potential initiatives that could be investigated as part of the sector strategy may include the feasibility for community – based tourism initiatives such as the following: -

- Entertainment Areas – such as Cultural Villages.
- Hospitality Services – such as African Restaurants, coffee shops, pubs and a Petrol Filling Station.
- Crafts and Handworks – establishment of the Craft Centre.
- Accommodation side – establishment of the Rural B&B on the appropriate location.

According to the IDP, an analysis of the KZN Wildlife GIS database identifies two categories of environmentally important areas as occurring in the municipality:

- Important Species Sites.
- Sites of Intrinsic Biodiversity Value.

‘The important species identified as potentially occurring in the municipality is Oripi and the location is the north-western portion of the municipality. The locality is contiguous with areas in the Emnambithi municipality. This area overlaps with the important flood plain of the Sundays River. Areas of high intrinsic biodiversity 3 have been identified in the Indaka Municipality. These are located in the high lying areas, particularly around Jobskop and in the ridgeline forming the watershed between the Sundays and Tugela Rivers. Some other isolated areas in proximity to streams/wetlands have also been identified. Many of the steep slopes of the uThukela Gorge and of the Sundays River valley have been identified as areas of intermediate biodiversity value, as have the slopes of Jobskop’. This suggests the potential for eco-tourism.

Strengths	Weaknesses	Opportunities	Threats
Zulu Culture and tradition	Limited / no tourism products	Build on the Zulu Culture	Land degradation
Cannibal caves	Poor internal road linkages and infrastructure development	Community based Tourism opportunities for a cultural villages and traditional hospitality services	Underdevelopment
Uthukela River Gorge and Sundays River Valley	Only one BnB available	Provision Accommodation	Lack of funding
Highly skilled with arts and crafts	lack of market potential to sustain the tourism sites developed	Arts and Craft centre	Political strife and crime

	Lack of natural resources,	Township Tours	
	Distance from any major tourist routes.	Indaka residents are generally highly skilled in producing beads, traditional hide skirts, grass mats and containers	

2.3.1.2 UMTshezi Local Municipality

“By 2020, UMTshezi Local Municipality will be the champion of a Sustainable Development and safe environment”. The IDP together with the LED identifies tourism as an economic sector, and identifies various related projects such as a tourist craft centre, signage, brochures, a tourism corridor route between Weenen and Giants Castle, shopping malls in Weenen, Estcourt and Wembezi, tourist information centre and handicraft outlet in Wembezi. A main project that will guide tourism that has been identified is the development of a tourism strategy which has not been funded as yet.

UMTshezi Municipality is located at the foothills of the Drakensburg comprises parts of the Magisterial Districts of Weenen and Estcourt, the informal settlements of Cornfields, Thembalihle, Mimosadale, and numerous settlements around Weenen. Escourt is the largest commercial centre in the Midlands region, and an important service centre for nearby Mooi River, Winterton, Bergville, Colenso and Weenen and is therefore the main town. The areas is characterised by good potential agricultural land around Weenen Wembezi, Ennersdale, Beacon Hill, and South Downs, Frere and Chieveley and is dominated by commercial farmlands and sparsely located rural settlements. There are various rivers and tributaries running through the area, namely the UThukela River, and Bushman’s River. The area is rich in culture with a range of 18 recorded historical buildings (including the Fort Dunford and Weenen Museums)and monuments and of main attraction is the Battlefields route detailed further in the report as well as nature based tourist attractions, including;

- the Weenen Nature Reserve,
- Wagendrift Nature Reserve and Dam,
- Moor Park Nature Reserve,
- New Formosa Nature Reserve and
- Thukela Biosphere area
- Another main product is the Drakensberg Experience Route
- There are 14 Amafa declared sites

UMTshezi is rich in biodiversity and environmentally sensitive areas and should therefore be conserved. The area is also characterized by low skills development, and increasing unemployment and poverty as well as low levels of basic services. Weenen is said to be emerging as a tourist destination. Estcourt is well known for some of its industries such as:

- Eskort Bacon Factory (producing sausages and other meat products known throughout many parts of the world);
- Nestle (the largest factory of its kind in the Southern Hemisphere); and
- Masonite (producing hardboard, soft board and related timber products
- Other industries include glassware, nylon goods, maize products, and textiles.

Road Linkages and Infrastructure:

The National Road N3 also traverses the Municipality on its western portion linking the two major economic centres of KZN and Gauteng. The N3 also serves as a tourism development corridor. The LM is strategically located in close proximity to the Drakensberg World Heritage site. Major access routes include the N3, provincial routes R74 (potential tourism route linking Colenso, to Weenen to Greytown), R103, MR29, and MR10. The R74 serves as an important district linkage, connecting Emnambithi, Imbabazane and Okhahlamba LMs as well as linking to surrounding areas such as Umvoti LM.

Tourism routes identified through the SDF include;

- P11 linking Bergville to the west through Winterton and Ladysmith to the north through Colenso.
- P13 from Estcourt to Weenen and eventually the north coast.
- P29 from Estcourt through Wembezi to Ntabamhlophe in Imbabazane and Giants Castle. As identified through the SDF.
- P170-D385 corridor is a proposed corridor linking the eco-tourism and leisure node of Wagendrift Dam through Estcourt town with the

UMtshezi lies on the Johannesburg-Durban electrified main railway line, facilitating the transportation of goods to and from the town. uMtshezi has a highly efficient, reliable and cost effective electrical infrastructure, which supplies its large industries with all the power they need to run their plants.

UMtshezi is bounded by the Emnambithi LM, Indaka LM and Msinga LM, Mooi Mpofana, Imbabazane and Okhahlamba LMs. It forms part of UThukela River catchment through Bushman's River and UMtshezi River.

Potential for Tourism in uMtshezi

As indicated by the municipal strategies, potential for future tourism development include non-agricultural activities such as agri-tourism, game farms with themed estates or lodges, resort developments, etc. which should be located on land with moderate agricultural potential. Proposed Big Five Game Reserve but running along the eastern boundary of the municipal area. It is essentially a tourism corridor, but its future development should provide for a strategic of agricultural and eco-tourism activities. From Weenen, this corridor runs northwards into Indaka Municipality where it links with the proposed Cannibal Route.

Tourism in uMtshezi LM is considered to contain cultural and eco-tourism opportunities. It is important that these opportunities are exploited as a substantial amount of national resources are channelled into the tourism sector. The SDF identifies future product development in the form of game farms (for hunting or conservation purposes) along the R74.

Projects:

The Bushman's River Tourism Association in partnership with the UMtshezi Municipality have for the past two years been developing a Tourism Route through the area which is known as the "The Drakensburg Experience", which was launched during 2008. This venture will assist in boosting the economy and will create job opportunities in the UMtshezi area.

UMtshezi Arts and Culture Beneficiation Project:

The UMtshezi Arts and Culture Beneficiation Project offer visitors a chance to hear traditional Zulu songs and see dances performed by local dancers. Tourists can experience a traditional dance routine with drumming. The dance reflects the traditional victory dance of the Zulu people.

Accommodation:

There are 15 recorded accommodation businesses in uMtshezi, majority of which being BnBs and guesthouses, 2 hotels (Sunrise Hotel and Willowgrange Hotel), and one caravan park. A full list with details is available. Estcourt known for the businesses attracts a lot of business people, and through stakeholder consultation it was found that lodges are always full mainly of business people staying for 2 nights on average. Accommodation is as follows:

• Oak Cottage
• Self Catering
• Thyme and Again
• Guest House / B&B
• Ashtonville Terraces Guest House
• The River House Guest House & B&B
• Blue Haze Country Lodge
• Snooze and Cruise B&B
• Greystone Camp and Adventure Centre
• Estcourt Caravan Park
• Val U Lodge
• Sunrise Hotel
• Willowgrange Hotel
• Beechwood Place
• Glenroy Guest House
• Bushmans Rest B/B
• Witthoft B&B

MICE venues:

There are two conference facilities in the Estcourt vicinity, one at White Mountain Lodge and one at Blue Haze Country Lodge.

Restaurants and catering:

The following eating outlets are provided in UMTshezi. These are concentrated in specific places, for example, Harding Street, and at accommodation facilities and there are only two restaurants.

Mr Frangoes	Harding Street	036 352 6164
Sunrise Hotel	Alfred Street	036 352 3008
Village Gossip	Lorne Street	036 352 7111
Kentucky Fried Chicken	Harding Street	036 352 6165
Chicken Licken (Halaal)	Harding Street	036 352 3537
Blue Haze Country Lodge	Moor Park Road	036 352 5772
Everfresh Takeaway(Halaal)	Albert Street	036 352 2915
Willowgrange Hotel	Willowgrange	036 352 7102
Val U Lodge	Harding Street	036 352 6760
Midway Restaurant	Midway	036 352 3767
Owl And Elephant	Weenen Road	036 354 1147
La Passion Restaurant	Spar Complex	036 352 3024
Bismillah (Halaal)	Albert Street	036 352 4189

Tourist Reception;

UMtshezi is very hands on with tourism awareness among school children, by providing talks on tourism etc. This can be seen from the year plan set out.

The UMTshezi year plan for 2012, includes the following activities to be undertaken:

- UMTshezi Beautification Project by Developing "Welcome to UMTshezi signs Banners and Gardens at Both entrances in order to make our town welcoming
- Visit Schools Grade 12 Learners
- Workshops for Petrol Attendants
- Inspection of Tourism Sites
- Tourism and museums to work together (tourism to expose museums to more people and school tours)
- Renovations to tourism Office
- General Signage
- Brochures of Estcourt
- Tourism Expo be incorporated
- Advertise UMTshezi Tourism Bureau in the Estcourt News

Strengths	Opportunities	Weaknesses	Threats
Road (R 74 and R 103) and rail infrastructure	Eco-Adventure tourism	Limited exposure and marketing and no brochure	Faction fighting
Heritage and cultural products (18 historical products including two museums) and Battlefields route	Business tourism (a range of businesses attracting business people)	No LTF/CTO	
Zulu Culture and history (rural settlements)	Future product development (game farms, agri-tourism)	No tourism strategy	
Nature based tourism (6 Nature Reserves and Wagondrift dam)	Route development along R74 and R103)	Lack of permanent staff	
Many tourism products (including provincially managed EKZNW sites) and Amafa sites	Environmentally sensitive areas and biodiversity	Limited accommodation, conferencing venues and eating outlets	
Year plan	To educate school children and local communities	Area is not welcoming to tourists	
Database of monuments and eating places are captured however are only accessible via the internet and at the tourism office		Stakeholders not collaborating	
Brochure management that comes to deliver or fetch brochures from various offices, we do not pay for this either, and Tourism KZN also sends us brochures.		Difficult to obtain statistics for tourism in uMTshezi	
Bushman's Experience		There is no Brochure for the LM due to lack of	

		funding, information is printed as and when people need it	
		The main market is scholars	

2.3.1.3 Imbabazane Local Municipality

Imbabazane LM is surrounded by the Okhahlamba LM, UMTshezi and Mooi Mpopfana LMs. The municipality is characterised by dispersed rural settlements/villages and low service delivery. The municipality is largely reliant on Escourt and Ladysmith as service centres for shopping and other services. The LM is strategically located at the foot of the UKhahlamba - Drakensberg World Heritage Site Mountains. A key factor is the N3 which intersects the municipality making it quite accessible to passers-by. Imbabazane It is divided into two sections (Loskop and Ntabamhlophe) with six traditional authorities.

The Imbabazane IDP hopes to stimulate local economic development through tourism by promoting community based tourism, development of new tourist attractions, developing a craft centre / training and programme, investigate the feasibility for the development of a traditional village at Mahlutshini and Amangwe area and by facilitating the establishment of community tourism Association.

Thus far, the location of ILM in close proximity to this precious resource has not materialized into major job creation and economic spin offs for the communities residing within Imbabazane. Correspondingly, it must be highlighted that Imbabazane is an underprivileged area in terms of tourism facilities, development and infrastructure when compared to other areas within the district however its strategic location adjacent to the Drakensberg should be seen as an opportunity for tourism development since the tourist that visits the Drakensberg travel through the routes that exists within Imbabazane to get to the Berg (Imbabazane Tourism Strategy: 2007).

The Drakensberg is the main tourist attraction to the district as it has been proclaimed a World heritage site by UNESCO. Imbabazane is strategically positioned in relation to one of the world's most prominent tourist attractions, the UKhahlamba Drakensberg World Heritage Park, and most of the routes utilized to access the park is through Imbabazane LM, this suggests the potential future development for Imbabazane Municipality.

According to the IDP tourism in Imbabazane has not been developed to reach its full potential. The North and South Western parts of Imbabazane have the Drakensberg Mountain, which is a 'draw card' for the tourists at all, levels (i.e. foreign, domestic and local). The tourism sector within Central Drakensberg, which is adjacent to Imbabazane is mainly structured around the **nature based and adventure tourism** with activities, which includes hiking, bird – watching, wildlife drives, walking trails, fly fishing, San rock art tour, picnicking and adventure sports or events. The tourism assets and facilities that exist include the nature reserves and the accommodation facilities e.g. UKhahlamba Drakensberg Park (a declared World Heritage Site) and complimentary facilities, which includes accommodation provision from Injisuthi and Giant Castle lodges. The White Mountain lodge is another tourist facility that exists within Imbabazane's area of jurisdiction and it is currently catering for the tourism sector within the wider area of Central Drakensberg.

The Hlatikulu Crane & Wetland Sanctuary is a rescue, rehabilitation, and captive breeding facility for all three of South Africa's crane species. There are 15 crane species from around the world and all of them are endangered or under threat to some degree. The main reason for this is that cranes are

intimately linked to the grassland biome – often limited to wetlands – and this biome is the most threatened by agriculture and other human activities¹⁴.

Tourism development Plan

Imbabazane makes up the central Drakensberg area and the key attractions are as follows, according to the tourism development Plan:

- Giant Castle Game Reserve (60% of international tourists are made up of the UK and Germany market)
- Injisuthi Camp (60% of tourists are local)
- White Mountain (50% visitors are local and 50% international)
- Bushman Cave Museum
- Hlathikhulu Crane and Wetland Sanctuary (80% international)
- Hillside Nature Reserve and Langalibalele Arts and Craft

The five key tourism experiences of Imbabazane are:

- Eco and Nature based tourism, adventure tourism, geo-tourism, and avi-tourism. The tourism products are:
 - Hiking/ Mountain Climbing
 - Aesthetic and Scenery Landscape
 - San Rock Art and the Bushmans Cave Museum (Amafa declared two sites with regard to Rock Art and feasibility studies have been undertaken).
 - Avi-tourism including viewing of vultures, eagles and cranes. The P9 is a birding route.
 - Horse Trails
 - Fishing, Bird Watching, Canoe and Biking
 - Helicopter Tours
 - Craft Centre

Tourism experiences that are proposed through the Imbabazane Tourism Development Plan are route tourism (the Drakensberg Experience Route proposed by the Bushmen's River Tourism Association in collaboration with UMTshezi LM which cuts through Imbabazane through to UMTshezi LM) and community based tourism as there is currently a social responsibility project initiative funded by DEAT that will be implemented as soon as the planning process is finalized. The initiative is referred to as '**Mazibuyele Emasisweni Cultural Village**'. It entails the construction of a cultural village, with stores selling various crafts & related products, a restaurant, and conference facility as indicated by DEAT. The aim is also to accrue benefits to the local communities.

The tourism development plan proposes the following future tourist opportunities, agri-tourism, heritage tourism and rural Tourism which are said to depend on a number of strategic product development and marketing. Future tourism product development should however, take into account the current supply and demand in order to not produce a situation of oversupply of specific tourist attractions and experiences and move toward creating varied experiences building on the major tourist 'draw cards' of the district. Imbabazane can contribute to this majorly due to the products that do exist. The aim is also to promote the green economy.

Through stakeholder consultation the problems that exist which hinder tourism development are politics, construction of roads, for example, there are many potholes near Injisuthi and Giants Castle. This is a major hindrance as these are the main attractions in Imbabazane LM. Signage and safety is also seen as an issue. Imbabazane is pro-active in creating tourism awareness among school children and the community through L.E.D and skills development. The Hlathikhulu wetland is involved with

¹⁴ http://www.enviroed.co.za/crane_sanctuary/crane_sanctuary.htm

tourism education. There is an educational awareness programme, which includes assisting the local people to create jobs and promoting local tourism guides¹⁵. Imbabazane is also famous for events, well known events include the White Mountain Music Festival (the LM is responsible for financing a portion of the event), Mountain Bike Challenge at Giants Castle held in April, and the Comeback Outdoor Challenge. Advertising for Imbabazane attractions include, Indaba, N3 Gateway, KZN Wildlife websites, there are two brochures, which are distributed by TKZN and a service provider to King Shaka International Airport, local tourism offices, and word of mouth. A challenge the LM experience is to develop a C.T.O. There is a local tourism Forum, and belong to the N3 gateway and Open Africa C.T.O's. There is a tourism brochure available. The aim is to promote cultural tourism. The LM is awaiting funds from the National Lottery to build a museum and tourism office. Main attractions include, Injisuthi Game Reserve and Giants Castle.

• Accommodation and hospitality:

Facilities at Giants Castle include a shop with a wide range of supplies and curios, the Izimbali Restaurant and pub and the Rock Lodge Conference Centre which can arrange a variety of interesting outings and team building activities suitable for delegates. These include guided cultural tours to the local amaHlubi community, traditional Zulu dance and song events, high-altitude guided trails and much more. Companies can take advantage of special group rates in May, June and July. Weddings and other functions can also be arranged in this venue. The Giants Castle reserve's accommodation consists of 37 two-bed chalets and four four-bed chalets, each outfitted with en suite facilities, a lounge/dining area and fully equipped kitchens. There are also three six-bed chalets featuring three bedrooms, one bathroom (with a separate toilet), a lounge/dining area and a fully equipped kitchen. All units are equipped with satellite TV, and all other amenities are provided – guests need only bring their provisions or use the restaurant facilities.

The Injisuthi camp has 15 fully equipped, self-catering cabins. Each cabin has two bedrooms and sleeps four people. Cabins have a bathroom, lounge and dining room, as well as a fully-equipped kitchenette with refrigerator and stove. Cabins do not have plug points, but electric lighting is available in the evenings and all cabins are fitted with cosy fireplaces. There is also an eight-bed dormitory cabin and spacious campsites that can accommodate up to 120 people.

The White Mountain Lodge contains 6 different sized camp facilities, a honeymoon chalet, a variety of 2 to 6 berth chalets both self-catering and full board options. There is a restaurant at the lodge. Abseiling, cross- valley foofy slide, river rafting, hiking, fishing, fantastic dining, historical sight-seeing or plain old relaxing are all provided for at White Mountain Lodge. The lodge offers conference facilities; there are two conference rooms, a breakaway room, a board room, as well as team building initiatives. There is internet access and other electronic facilities available.

There is a hillside camp with 20 sites available. There is also the Ntabamhlope lodge and a lodge at the Hlatikulu Wetland Park.

The strengths, opportunities, weaknesses and threats of tourism in Imbabazane are as follows;

Strengths	Weaknesses	Opportunities	Threats
Strategically Located within the UKhahlamba Drakensberg precinct	Tourism infrastructure in the within Imbabazane is underdeveloped, the condition of the roads is very poor and there is very little signage being undertaken	Cultural and recreational activities cannot be offered within the Drakensberg Park due to environmental regulations, these can therefore be provided by the surroundings	Land Legal issues between land conservation bodies and communities

¹⁵ This is a privately run initiative and information is available on www.enviroed.co.za

Abundance of natural resources and biodiversity attracting tourists commuting via Imbabazane roads (Ntabamhlope road being one of the main roads)	Activity in the central Drakensberg is largely generated by the resorts with limited linkages to rural communities	Current ‘Mazibuyele Emasisweni Cultural Village’ project	
Adventure tourism and tourist entry point to the Central Drakensberg	Lack of the experience building up to the Drakensberg, for example,	To develop an ‘African Experience’ leading up to the central and northern Drakensberg along tourism corridors identified (See Attractions map below)	
Political and community buy in for community based tourism	Low skills, education and entrepreneurial ability of the surrounding communities therefore limited ability to access funding	To develop community based tourism through linking traditional practices and cultural beliefs of the rural communities	
Estcourt-Winterton railway line	Limited training of councillors	The rural communities have vast talents, which they are not exploiting to benefit them economically these includes art and craftworks etc. The opportunity exists through skills development to empower these individuals and ensuring that they are fully equipped to be the entrepreneurs in the tourism industry.	
MDTC	Relationship between LM and local stakeholders	To develop agri-tourism and rural tourism	

2.3.1.4 Emnambithi Local Municipality

Ladysmith is the main administration and business centre of the Emnambithi LM, and is located just off the N3. Ladysmith together with Ezakheni, Steadville and Colenso/ Nkanyezi are the main urban areas. Emnambithi is located along the N11 National Route, 20 kilometres off the National N3 route. Emnambithi falls along the border of the Free State and consists of the Van Reenens Pass. The primary attractions that currently draw tourists to the region, or to pass it by, are the Battlefields, Drakensberg and flow through tourists travelling to the coast (or interior). 70% of the municipality is rural. Emnambithi/Ladysmith Municipality lies on the banks of UThukela River within the region of Northern KZN and bordered by the greater Drakensberg Mountains to the extreme West. The main rivers within Emnambithi include the Klip River, Tugela and Sundays Rivers. There are relatively low levels of access to urban services and facilities for the majority of rural communities and extensive area of watercourses requiring careful environmental management. Emnambithi is an active member of N3 Gateway, Open Africa, Battlefields Route Association, provincial master plan study group, Provincial Tourism Committee and Provincial Tourism Forum.

"Emnambithi/Ladysmith will grow the economic value of its tourism sector by increasing the number of domestic and foreign tourists attracted to the area by virtue of its geographic locational

advantage. This will be achieved through the development of its unique cultural heritage draw card centred on its Ladysmith Black Mambazo roots; strengthen its offering of Battlefields and historical heritage product base; establish linkages with the Northern Drakensberg; and marketing of its wildlife attractions”¹⁶.

The IDP maintains tourism development as a priority through the frequent dissemination of information and hopes to optimise the inherent tourism and recreational potential of Emnambithi. The LM recognises and prioritises the Battle sites and as being of Provincial importance, and has taken strides to fast track approval of the applications for BnB’s and Guesthouses¹⁷. The IDP further prioritises tourism as a cross cutting issue, which features in infrastructure plans as well, tourism development is seen as a key performance area. As one of the objectives of the environmental planning and management division, is to explore and expand opportunities for tourism, eco-tourism and sustainable land use. There are various wetlands in Emnambithi and are seen for their tourism potential. Part of the infrastructure and management divisions’ vision is to invest in infrastructure and maintenance of infrastructure to among other aspects, position Ladysmith/Emnambithi as a vibrant trade and tourism interlink. Safety and security is also prioritised which involves the eradication of crime which has affected business confidence levels and tourists as well as to promote job creation through tourism among other sectors. This suggests that tourism in Emnambithi is growing due to various factors which will be discussed below.

Local Economic Development Review 2010

Culminating from the S.W.O.T Analysis for the LED for the municipality, issues related to tourism development are,

Strengths	Opportunities	Threats	Weaknesses
Strategically located between JHB & DBN on the N3	Branding the city “The home of Ladysmith Black Mambazo”	Lack of funding for tourism initiatives	Weak co-operation & communication between local and district municipalities
Good Infrastructure (road & rail)	Tourism (Siege of Ladysmith)		Land owned by the Ingonyama Trust is a time constraint on development
Good working relationship with TIKZN	Encourage and promote Big 5 Game Reserves		Shortage of marketing and communications
Pro-active Municipality	Regular flights into Ladysmith		The N11 entrance into the town is dangerous
Situated at a major rail junction	Arts & crafts (development and retail of)		Lack of art & cultural support, promotion, and events
Diverse economic base	Ladysmith has become a business tourism destination		Lack of representation from the Indian Community in arts & crafts
Lots of land available for development	An opportunity exists to hold international heritage conferences and events		The tourism market is uncoordinated
Local airport			Limited/no conference facilities
Linkages with			

¹⁶ Haley Sharpe and Grant Thornton. 2005. Emnambithi-Ladysmith Tourism Development Strategy 2005

¹⁷ The municipality receives at least 2 applications per month. Establishments are listed on Bill boards to inform users of the facilities available.

surrounding DMs such as Amajuba			
Local and international events are a draw card to the municipality which is good for exposure			

Potential projects identified through the tourism strategy are as follows:

- Encourage development of the Colenso and Ladysmith Caravan Parks
- Encourage development of conference & function facilities (weddings)
- Development of a River Resort/Waterfront (incl. Retail & conference facilities)
- Implementation of the Tourism & Agricultural Strategies
- Provide signage in key locations around the E/L Municipality
- Market the town locally, nationally and internationally – was a priority project
- Investigate further exploitation of the battlefields route
- Promote local tourism facilities (incl Eco-Tourism)
- Tourism Indaba
- Ladysmith Black Mambazo Academy
- Database of local artists, crafters, musicians
- Development of additional recreational facilities (petting zoo, craft market, parks, Shute building)

Tourism Development Strategy 2005 – Haley Sharp

Strengths	Opportunities	Threats	Weaknesses
Ladysmith is at a geographical advantage because it is located centrally between Gauteng and the coast, and the Battlefields and the Drakensberg. The ELM is easily accessible from major national highways (the N3 and N11).	Ladysmith Airstrip	Est. tourism attractions	UThukela does not have a tourism strategy – which is now being implemented
Link to the Free State via Van Reenen is the gateway to KZN.	Ladysmith Black Mambazo and Music	Quality of tourism products	Poor communication among stakeholders
The ELM is located in close proximity to the Battlefields and Drakensberg.	Attract the influx of people commuting along the N3		Lack of sufficient budget for marketing and other tourism resources
Cultural Heritage <ul style="list-style-type: none"> • The area has a strong cultural heritage with Ladysmith Black Mambazo and traditional music being key components. 	Potential to introduce rail tourism		Limited market research on tourism (car rental, buses, stability and safety issues)
Seige Museum	Linkages with Birding in Amajuba and Drakensberg (Malandeni Bird Sanctuary)		Lack of marketing
Wildlife and Nature <ul style="list-style-type: none"> • Nambiti Conservancy provides an upmarket, Big Five wildlife experience. • The wildlife industry is steadily developing within the municipality. 	Potential exists for township tourism and exploiting the Zulu culture		Signage

	Adventure and scenic activities at the Collins and De Beers passes		Lack of tourism awareness and education
	A major market to Emnambithi are the business tourists		Statistics are not well recorded nor kept on a single accessible database.
			There is no events strategy
			No large conference venue
			Information is not easily accessible

According to the Emnambithi Tourism Development strategy the following tourism products are offered by Emnambithi LM:

- **Cultural heritage.** The ELM has unique roots founded in its association with Ladysmith Black Mambazo, which has potential but has not yet been aggressively marketed or supported by high quality products.
- **The Battlefields.** Particularly relating to the Siege of Ladysmith and the improvement of existing products from an interpretive aspect.
- **Drakensberg.** Particularly relating to Van Reenen and linkages with the Drakensberg Boys' Choir.
- **Wildlife and nature.** The ELM has only recently seen growth in wildlife products, especially with the developments of Nambiti Conservancy, Emnambithi Game Reserve and the game reserve outside Colenso. This market is untapped within the municipality.
- **Rail tourism.** TKZN has recently accepted a Rail Tourism Strategy for the province where Ladysmith forms a core railhead for trips into the Battlefields and Drakensberg. This option is not currently available in the municipality.
- **Events.** The ELM has a limited number of events and no events strategy but the potential exists to use events as key marketing tools for tourism in the municipality.
- **Transit.** The ELM has a large transit market, especially in terms of foreign tourists, who pass through the area along the N3 and N11. Flow-through tourism is an important aspect of tourism in the municipality.
- **Business.** The largest current source of domestic tourists to the ELM is business tourists.
- **Scenic.** The ELM has a number of mountain passes that have not been marketed, nor has product been developed. These include Van Reenen, in particular, De Beers Pass and Collings Pass.
- **Adventure.** Potential may exist in the mountain passes, wildlife areas and along the Tugela River.

Tourist attractions within Emnambithi include¹⁸:

¹⁸ A detailed list with explanations as provided by Emnambithi LM is available

- There are various Battle sites such as the Battle of Colenso, Vaalkrans, Tugela Heights, Spioenkop, Elandslaagte, the Siege of Ladysmith and Battle of Platrand/Wagon Hill.
- There are 14 Amafa declared sites
- There are various religious sites such as the Soofie Mosque in Ladysmith, Smallest Church in the World at Van Reenen, Maria Ratschits mission and St Josephs Mission, All Saints Church: built in 1902 and the Statue of Ghandi.
- Emnambithi/Ladysmith Cultural Centre: Based at the Railway Institute Building and comprises of a Tourism Visitor Centre, Ladysmith Black Mambazo Centre and the current refurbishment will increase exhibition space, coffee shops and a new Arts Centre. The centre also focusses on the History of the Zulu Nation and Bushmen.
- Wildlife: **Nambiti Private Game Reserve** – the only game reserve in the region to keep the ‘Big Five’ with activities including 4x4 trails, quad biking, white water rafting, mountain biking, rock climbing, kayaking, horse riding, hiking, canopy tours, fly fishing, mountain boarding. The Nambiti Game reserve has hosted the South African White Water Championships and also offers helicopter flights utilizing the Ladysmith Airfield¹⁹
- There are 4 museums, namely, the Siege Museum, R E Stevenson Museum, Moth Museum and Emnambithi Cultural Centre.
- Various international and national events to be listed further in the report which also include Van Reenen events in Ladysmith. Key annual events are:
 - Battlefields Heritage festival
 - Siege and Relief of Ladysmith
 - Mega Music Festival
 - Heritage Festival
 - Yenza Cultural Festival
- Windsor and Qedusizi Dams
- Mural Art/Drive-About (Self-guided)
- Malandeni Bird Sanctuary which is in poor condition
- Ingula Wetlands
- Lions Park and Wimpy Park
- Trenchgula Guest Lodge & Game Farm: Species of game on the farm include blesbuck, bushbuck, duikere land, giraffe, impala, nyala, ostrich, mountain reedbuck, steenbuck, springbuck, waterbuck, wildebeest, bush-pig, zebra and a variety of bird species
- The Yenza Project in Van Reenen
- Kidston Memorial
- Moordraai Gravesite
- Swinburne Bridge

Accommodation and hospitality

9 Safari lodges and one tented camp available at the Nambiti Private Game reserve. There are nine guest houses (Please see annexure for a detailed list), 6 hotels (Royal Hotel, Crown Hotel and Hotel Natalasia, The Green Lantern Inn, Montrose Protea Hotel, Oaklands Country Manor), 2 motels (The Pyramids Motel and Ladysmith Motel) and approximately 40 Lodges, BnBs and guest houses collectively. Accommodation available in Van Reenen includes: Appin Guest Farm, Tandjiesberg Adventures, Yellow Wood Bush Camp, 10 BnBs and self-catering cottages. A list of 50 caterers in Ladysmith is as follows:

Name Of Company	Contact Person	Contact Details
	Thamsi Sithebe	036 – 631 3414/072 118 3267
	Mrs B Singh	036 – 633 3907
	Mrs A Singh	036 – 633 2090

¹⁹ The Ladysmith Airfield was recently bought by the Nambiti Game Reserve.

	Mrs H Asmal (Halaal)	036 – 633 2654/ 084 457 8656
	Imelda Iyer	036 – 631 1068/072 335 1800
	Mrs M G H Hansa (Halaal)	036 – 631 0702/036 – 633 1325
	Miss F Karrim (Halaal)	036 – 631 2916
Al-Zara's Caterers	Zohra, 21 Protea Drive	036 – 633 3662/ 073 239 2569
Amod's Décor (4 Soofie Road)	Shafie	084 852 6284
Banana Vukuzenzele (Matiwanoskop, P O Box 2643, Ladysmith)	D B Mgoma S D Mdlolo	082 209 0947 082 763 7569
Bemath Caterers	Irfaan	082 477 8642 036 – 637 3195
Bites Of Heaven – Trish		083 556 5084
Crown Hotel		036 – 637 2266
Eats & Treats (Halaal)	Ahmed Sardiwalla	036 – 631 4306
Exotic Events, Pbs Building, Egerton Rd	Mbali Sibiya	036 – 631 0507/082322 1717 Fax: 036 – 631 4077
Ezakheni Youth Catering Club		036 – 636 2332
F Asmal	Fathima Asmal (Halaal)	082 209 0946
Fountain Health & Management Services (26 Limit Hyde, Limit Hill, Ladysmith)	Busisiwe Ngobeni	083 522 6776/083 475 3820 Fax: 036 – 631 0871
Ikhwezi Management Service	Nathi	036 – 422 2176/082 752 3234
International Caterers		082 638 8823
Jabulani Catering (Steadville)	Nelly Twala	083 990 8029
Katey's Catering (41 Fifth Street, Limit Hill)	Colleen Mlambo	036 – 633 0944/073 302 0120
Kency Cc	Mrs D C P Mazibuko	036 – 636 1489/082 696 1381
La Maison		082 806 0682/036 – 635 5000
Ladysmith Widows Co-Operative (Watersmeet)	Eunice Masondo	072 147 8358
Magical Decor & Catering	Also Do Birthday Parties	076 462 0606
Majik Decor Emporium & Catering		073 412 1241
Mala – Indian Weddings		083 450 8488
Malinga Business Enterprises	Phindile Zungu	082 841 3830
Naunton's Guest House	Rose Du Toit	036 – 631 3307/084 618 6040
Qaludle Co-Operative (34 Avante Flats, Camp Road)	Siphokazi Ngcobo Bridget Zwane-Mkhize	073 723 8521 072 174 2272
Royal Hotel		036 – 637 2176
Roz Enterprise	Luyanda	036 – 631 4559/084 278 0658
Sakhisizwe Organisation – Rebecca Mvelase		082 254 5988
Sibani Construction & Catering	Mrs Dlamini	036 – 631 2396/083 336 5276
Sibusiswe Caterers	Mrs Emmah Khumalo	036 – 631 1728/072 348 9226 036 – 631 1728 (Fax)
Guinea Fowl Restaurant	Saneshan Govender	036 637 8163 Gfr@Webafrika.Org.Za
Simunye Catering Club – Sarah Zulu		036 – 636 1119/083 356 0990
Sisenawo Trading (Caterers)	Sebenzile Nkosi	073 012 4455
Sithokomele Trading Enterprise	Thandiwe Zikalala	082 622 4510
Smart Services And Suppliers	Hlengiwe	083 708 7747
T M S Enterprises	Thami	073 290 2324

The Dancing Gheko	Tony Or Deidre	036 - 637 4925
Thobeka's Catering	Nobe Mabaso	036 – 636 4091/073 172 1569
Thoko's Catering	Thoko	083 955 8315
Vusimuzi Catering (A1300, Ezakheni)	Phindile Mvelase	036 – 636 5817/083 204 0017
Xaba Food Suppliers		072 193 0841
Zethembe Catering Club	Thulani Mchunu	036 – 634 7690/073 314 5320
Quedusizi Catering	B Molefe, 140 Murchison St (Royal Hotel)	036 – 631 7554/ 082 909 6176/ 072 1922 451 – S F Shabalala

Outcomes of meeting with Stakeholders:

Emnambithi advertises with N3 Gateway, Open Africa, and exhibitions in the Gateway Show as well as International Tourism Indaba. The signage to Estcourt is bad. There is no CTO in Ladysmith but is currently being organised, there is a Ladysmith Tourism Association and Emnambithi/Ladysmith Tourism. There is a need for a proper CTO with representatives from council and private sector. Business tourism is rife, where many conferences take place, there is a shortage of conference facilities, and Ladysmith is of historical importance and home to many Battlefield sites. There is no synergy between LM and private sector. There is no separate budget for tourism. The N11 is in a bad state which is currently under construction. Stake holders see the potential for a tourism routes from O.R Tambo through to Kruger National Park, through to Newcastle then Ladysmith then to Drakensburg to Durban and then Cape Town. People are looking for varied experiences as 'they get bored'. Signage on N3 is not sufficient for Battlefields. An international History Conference was held in Ladysmith, this suggests, together with the business tourism that Emnambithi attracts, that the potential for future conferencing and business tourism is quite high and needs to be fostered together with UMTshezi LM. Another key asset is the big five game reserve and airstrip which was recently bought by private developers.

There is a lack of standards and limited licensing. Emnambithi is seen to be business tourism based. There is the establishment of the new mall on the corner of Helpmekaar and Newcastle. There is a Ladysmith Brochure. There is currently a project funded by DEAT, the Zithande Project which is a social responsibility project will be implemented at Ladysmith (Wimpy Park) and the project is intending to protect watercourse as well as developing a park in an open space at the side of the river. It entails landscaping and beautification of a park through plantation of trees, shrubs & other deliverables.

2.3.1.4.1 Workshop Outcomes

Colenso is of focus for the regeneration of the town which has tourism potential as the Battlefield sites are situated here as well a tourism information office currently being upgraded. There is a language barrier and emerging SMMEs do not understand the local business. There is a tourism office in Van Reenen which needs to be linked to other information offices in Emnambithi LM. Need to take into account the soft attractions such as the Indian community. Tourism must focus on tourism development holistically and not only on certain attractions. Marketing and branding is an issue, together with funding. There are existing Township and Rural tourism projects for which details are available. Medical tourism is also emanating in Emnambithi. The Nguni Route initiative supported by Open Africa was envisaged but failed due to weak institutional structures. The National Aerobatics Championships held at L/S airstrip in July. There is the Izimbali Projects which is N3TC funded.

Challenges	Opportunities
Signage is needed of the N3	Link midlands meander to uThukela
Funding	Link through N3 Gateway
King Shaka Airport – people cannot fly directly	Rural township tourism (relating to politics and

from Overseas to Durban which is hindering tourism.	history/violence associated and cultural activities)
Infrastructure – roads and signage to attractions	Proper marketing of Eco-tourism
Language barrier	Promoting Sport tourism
Segregation of linkages	Central location and link to N3 and N11 as an advantage
Unmaintained sites	Musical Heritage (Ladysmith Black Mambazo and Drakensberg Boys Choir)
Lack of tourism awareness	Historical monuments (eg 100 day Seige museum)
Communication barrier	Hospitality school
Insufficient funding for tourism marketing	Awareness should be created of career opportunities in tourism
Linkages between LMs	Inter cultural linkages such as maloti Drakensberg trans frontier program
Government restrictions	To form a RTO: <ul style="list-style-type: none"> ○ To include a small fee ○ Marketing ○ Criteria to become a member ○ Link with municipality which is very important ○ And must not be outside uThukela current boundary eg. Midland meander
Not enough conference facilities	Market what we have – many attractions
Lack of participation of local communities	Upgrade Colenso battlefields
Illegal businesses	Craft market next to highway (western bypass for Ladysmith
No CTO	Tourism training college
Transformation and gender inequality	Cable car to be moved from Didima to Spioenkop
Exploitation of black people by white people	International marketing and monitoring and evaluation put into place
Safety and security	
Lack of marketing	
Get cohesion amongst members in proposed RTO	
Lack of synergy and networking between political areas	
No systems for standards	
No tourism association	
Correct statistical info could be more beneficial	
By laws need to be regulated and there is no implementation	
Underutilised railway	
Key Actions required	
Establishment of CTO to regulate tourism industry (which will create awareness)	
Road shows (going to the people and work shopping them on tourism	
Government intervention wrt infrastructure	
Marketing to highlight historical value of L/S	

- **The Yenza Project in Van Reenen:**

The Yenza project is funded by N3TC, and is a Community Based Tourism Project. The project involves community events, job creation, the training of local tour guides, youth development, arts

and culture and heritage development etc. The project aims to train and empower local communities through responsible tourism development and to therefore contribute sustainably to the environment and community. The project is managed by Elsa Human and two assistants who are being trained to take over the project once the project manager as left. These assistants have become computer literate with the help of funding from N3TC to attend computer courses and obtain laptops. A succession policy exists to hand over the project to the local community. Amongst the many initiatives of the Yenza project are the following initiatives:

- Bird Guide Training and Nature Heros Birding which involves a group of children being trained and educated on birding which is a very successful project and is supported by Bird Life S.A
- Events such as: The great Gatsby Horse Race, Over the Edge Mountain Bike Race, and Yenza Cultural Festival which Emnambithi assist with.
- Social Awareness campaigns aimed at gearing the community for tourism such as the HIV/Aids Sports Tournament, Cosha Litter Recycling Project (which is one of the main projects with a very positive outcome) and the environmental campaign.

Given the above information extracted from interviews, and municipal strategies the below S.W.O.T can be concluded for Emnambithi LM.

Strengths	Opportunities	Threats	Weaknesses
Ladysmith is at a geographical advantage because it is located centrally between Gauteng and the coast, and the Battlefields and the Drakensberg. The ELM is easily accessible from major national highways (the N3 and N11).	Ladysmith Airstrip	Establish ed tourism attractions	UThukela does not have a tourism strategy – which is now being implemented
Link to the Free State via Van Reenen is the gateway to KZN.	Branding the city “The home of Ladysmith Black Mambazo”	Quality of tourism products	Poor communication among stakeholders
The ELM is located in close proximity to the Battlefields and Drakensberg.	Attract the influx of people commuting along the N3	Lack of financial resources	Lack of sufficient budget for marketing and other tourism resources
Cultural Heritage <ul style="list-style-type: none"> • The area has a strong cultural heritage with Ladysmith Black Mambazo and traditional music being key components. 	Potential to introduce rail tourism		Limited market research on tourism (car rental, buses, stability and safety issues)
Seige Museum	Linkages with Birding in Amajuba and Drakensberg (Malandeni Bird Sanctuary)		Lack of marketing and communications
Wildlife and Nature <ul style="list-style-type: none"> • Nambithi Private Game Reserve provides an upmarket, Big Five wildlife experience. • The wildlife industry is steadily developing within the municipality. 	Potential exists for township tourism and exploiting the Zulu culture		Signage
Good infrastructure – road, rail and local airport	Adventure and scenic activities at the Collins and De Beers passes		Lack of tourism awareness and education

Good working relationship with TKZN	A major market to Emnambithi are the business tourists		Statistics are not well recorded nor kept on a single accessible database.
Proactive municipality	Promote and improve cultural/heritage and business tourism established within the municipality (Battlefields)		Van Reenen is neither integrated into the LM and the research and audit of tourism products linked to Emnambithi
Linkages with surrounding districts	Promote and encourage Big Five Game Reserves		There is no events strategy
Local and international events are a draw card to the municipality which is good for exposure	Development and retail of Arts and Crafts		No large conference venue and facilities
	An opportunity exists to hold international heritage conferences and events and provide conference facilities		Information is not easily accessible

2.3.1.5 Okhahlamba Local Municipality

Okhahlamba LM with the inclusion of Imbabazane fall favourably within the UKhahlamba-Drakensberg World Heritage Site, which is the major draw card which has international, national, provincial, district importance (This will be discussed further in the report). Okhahlamba LM is favourably situated sharing a border with Lesotho, and the Free State. It is a neighbouring local municipality to Emnambithi, UMtsheni and Imbabazane. This is seen as a favourable location due to the cross border linkages which could be created and that are already created (such with the Maloti-Drakensburg Route). The major regional movement routes which intersect the area allowing for ease of accessibility are the, R74, R600, R616 and the N3 national movement route, which also link the Okhahlamba to the surrounding local municipalities such as Emnambithi LM. This strategic location along the N3 which is also a tourism route allows for massive opportunity for the area due to the high volumes of traffic which frequent the N3. There are also 3 landing strips within Okhahlamba, located along the R74, R600, and near Cathedral Peak.

The main towns of Okhahlamba are, Bergville, Winterton, Cathkin Park, Geluksberg, and two tribal authority areas which includes Mnweni which was recently declared a Wilderness area to be managed by KZN Wildlife²⁰. Okhahlamba is filled with tourism activity and potential given the natural and cultural attractions that are evident most importantly the Drakensberg escarpment. There are two authorized international access links between South Africa and Lesotho is Sani Pass and the Bushman's Nek Pass. Both passes are situated in State Forest Land, and are within the Park²¹. The R 74 is the main road providing linkages to Pietermaritzburg and the Free State and R 616 providing linkage to Ladysmith and Amajuba District. Along the N3 and N11, there are views of scenic beauty and landscape, which can attract both domestic and international tourist thereby promoting LED projects at some locations. The municipality overall is an environmentally sensitive area which needs to be conserved. The municipality is also characterised by relatively high agricultural potential with intense commercial activity taking place.

²⁰ <http://www.vertical-endeavour.com/drakensberg/73-environment/209-plus-one-for-conservation-in-the-mnweni.html>

²¹ Okhahlamba Local Municipality Draft Spatial Development Framework 2011

Okhahlamba Draft Simplified Reviewed IDP 2011/2012, prepared by the Okhahlamba Local Municipality identifies tourism as an economic sector which provides the municipality with a competitive advantage as well as to aid in the socio-economic development of the municipality by creating an enabling environment for it among other dominant economic sectors such as agriculture and commerce. Given the vision as follows, *“By 2030, Okhahlamba will be a prosperous area anchored on the preservation of World Heritage Site with its citizens enjoying a high quality of life”* it is clear that the Drakensberg World Heritage Site is a major contributing factor to the municipality and is therefore prioritised through the IDP. Tourism is the major income generator in the Municipality. In relation to the PGDS, a tourism corridor identified at provincial level, runs directly through Okhahlamba LM.

In keeping with the IDP, the spatial development framework, a key aspect is the potential and need to encourage potential linkages between commercial agriculture and the tourism industry is highlighted through the IDP. The spatial development issues in Okhahlamba include;

- the strategic location of a major tourist attraction such as the Drakensberg Mountain.
- high quality potential recreation resources (eg. dams and rivers)
- extensive areas of watercourses and conservation requiring careful environmental management (eg. Mnweni Valley)
- a number of areas of historical and heritage importance.

The SDF suggests that there is potential for agriculture and tourism along the R74 which relates to agri-tourism potential and initiatives and recognises the recreational potential for tourism in Okhahlamba LM. With regard to commercial agriculture and tourism, the SDF acknowledges that prime commercial agricultural land needs to be preserved and diversified in the form of tourism (agri-tourism). Although much of the area is farmed for commercial agriculture it contains a vast combination of natural resources and landscapes for getaway tourism. The SDF also suggests that in the course of diversifying to tourism conservation efforts should be applied using protection mechanisms such as biosphere reserves²². Any tourism development should integrate with such efforts. The SDF also suggests a considerable potential for community-based tourism and ecotourism in the area. The SDF also identifies areas of Environmental Significance which relates to the existing landscape and is one of the primary tourism attractions, and its maintenance should be taken into account. The intrinsic bio-diversity value of eco-systems and natural habitats on agricultural farmlands provide the basis for eco-tourism diversification and sustainable farming practices, thus activities need to be carefully planned in order to integrate with the environmental attributes and minimize any negative impacts. Areas of scenic beauty and view are also defined to emphasis the overall tourist experience in Okhahlamba.

The local economic development strategy of 2006 compiled by Mageba Projects summarises the strengths, opportunities, threats and weaknesses for tourism in Okhahlamba as follows:

Strengths	Opportunities	Weaknesses	Threats
<ul style="list-style-type: none"> • Availability of natural resources (e.g. veld, flowers and animals) • Dedicated and positive attitude of the people 	<ul style="list-style-type: none"> • Intensive training of local community • Partnerships of tourism role-players • Encourage more volunteers in 	<ul style="list-style-type: none"> • Insufficient accommodation • Lack of proper infrastructure • Heritage sites / routes not developed 	<ul style="list-style-type: none"> • Degradation of the environment, e.g. veld fires and pollution • Improper management of infrastructure

²² Biosphere reserves are areas of terrestrial and coastal ecosystems promoting solutions to reconcile the conservation of biodiversity with its sustainable use. They are internationally recognized, nominated by national governments and remain under sovereign jurisdiction of the states where they are located. Biosphere reserves serve in some ways as 'living laboratories' for testing out and demonstrating integrated management of land, water and biodiversity.

<ul style="list-style-type: none"> Heritage sites, we can also learn a lot and also teach others Royal Natal National Park 	<ul style="list-style-type: none"> tourism Sustained and combined marketing effort (Product specific) Expansion of Eco and Adventure Tourism Agri-Tourism Zulu Traditional Culture 	<ul style="list-style-type: none"> Lack of tourism skills within the general community General market unawareness of all that the area can offer. 	<ul style="list-style-type: none"> Crime, especially affecting tourists Lack of co-ordination amongst all role-players Lack of adaptation to market changes and needs
<ul style="list-style-type: none"> Good accessibility Established tourism market 		Lack of effective co-ordination and networking amongst tourism operators.	

Tourism is one of the economic drivers of this LM and opportunities exist in the municipality which if fully utilised can create jobs. According to the LED tourism is playing an increasingly important role in the local economy of Okhahlamba, with the wide asset base including a range of accommodation facilities, outdoor sporting and recreational activities.

‘The main tourism destinations in the OLM are Cathkin Park, Cathedral Peak, Royal Natal National Park, and Spioenkop, which includes the historical site, dam and lakeside resort run by Ezemvelo KwaZulu-Natal Wildlife. Locations of growing significance for tourism include the Mnweni Valley area, Okhombe and Busingatha Valley. Overall the Okhahlamba area represents (especially in partnership with surrounding areas e.g. Lesotho) one of the primary tourist potentials of South Africa. Although there is a substantial private sector involvement and investment into the tourism industry, there appears to be a lack of integration, marketing and a creative approach to local tourism. The tourism industry does provide jobs, but has not been integrated into the local community and its socioeconomic impact as a result has been limited.’²³

Tourist Attractions

The main tourist attraction is the Drakensberg Escarpment. The Northern Drakensberg area is not only famous for the natural attractions but is coupled with the cultural and heritage significance as well. The sites therefore offer more than conservation, nature and eco-tourism, but include heritage and cultural tourism as well as adventure tourism. Complimentary the Drakensberg escarpment is:

- Drakensberg Boys Choir
- Hot Air Ballooning²⁴: a recent local initiative. Previously they had to come from Johannesburg to fly in the Drakensberg.
- Located near Bergville which is described as the gateway to the tourism mecca of the Drakensberg are some of the most picturesque holiday resorts, such as Catkin Peak, Cathedral Peak, Champagne Castle, Oliviershoek, and Rugged Glen Nature Reserve. Spioenkop’s historical site, lakeside resort and dam run by KwaZulu-Natal Wildlife are all situated close to the town.
- The Royal Natal National Park and the Rugged Glen Nature Reserve boast one of South Africa’s most beautiful mountain landscapes, which include the magnificent peaks of Mont-Aux-Sources. The awesome pinnacle is 3 283 m high and the flat summit can be reached by

²³ Okhahlamba Local Municipality Integrated Local Economic Development Programme 2006 -2010

²⁴ Contact details for the Hot Air Ballooning initiative is: 082 802 7520, or 036-4881327 (from 8am – 1pm)

means of a chain ladder. From that vantage point, the view over Natal and Lesotho is impressive.

- The Royal Natal national Park houses the Amphitheatre
- Tugela Falls which is the second highest water fall in the world
- Issues which need consideration are: substantial private sector involvement, partnerships with local communities, responsible infrastructure provision and efficient marketing and information centres.
- Between Bergville and the Royal Natal National Park is the Zulu handicraft centre of Thandanani that sells a variety of traditional beadwork, woodwork and baskets.
- Spioenkop Battlefields and Nature Reserve
- Van Reenen is located at the border between KwaZulu-Natal and the Orange Free State on the main N3. The little village is famous for having the Llandaff Oratory, the smallest church in the world - capable of a full house of 8 people. The church was built by a father in memory of his son who died in a mining accident.
- There are four dams in Okhahlamba are;
 - Spioenkop Dam
 - Woodstock Dam
 - Kilburn Dam
 - Driel Dam
- The Council manages a caravan park and holiday huts on the bank of the uThukela River. A playground and facilities for sports, including swimming, tennis, bowls, cricket, golf, rugby and badminton, are available. A modern community hall serves as a town hall.
- Winterton Museum
- Lost Valley

The Royal Natal National Park: The main features of the park are the Drakensberg Amphitheatre, a rock wall 5km long by up to 1200m high, Mont-Aux-Sources peak where the Orange and Tugela rivers have their source, and the 947m Tugela Falls, the world's second highest waterfall. The famous Cannibal Caves are also located here.

Accommodation in Royal Natal National park: consists of the Thendele Upper and Lower camps. There are four chalets, 1 lodge and one cottage. Camping and Caravanning is also offered.

Activities: The Royal Natal National Park offers a myriad of hikes and walks that explore the incredible beauty of the Drakensburg mountains. There is a two-day hike up to Mont-Aux-Sources that allows visitors to be at the summit of the Amphitheatre, or take a short walk up to Sigubundu Valley to view the Bushman paintings. Activities include hiking, horse riding, swimming, picnicking, birding (Bearded Vulture (Lammergeyer) and Black Eagle riding thermals that rise above the Mont-aux-Sources plateau) and fishing.

Cathedral Peak and Didima Valley

This important feature of the Central Drakensberg area boosts some of the Drakensberg Waterfalls, with magnificent views offering 4x4 trails. It encompasses the Rainbow Gorge and San Art Centre as well as Mnweni Cultural Centre. There are a host of adventure activities held here, including helicopter rides.

Accommodation includes Didima Resort. There is the Cathedral Peak Hotel, which contains a conference centre and other facilities such as a chapel, and serves as a wedding venue. The Cavern Drakensberg Holiday resort, which entails various adventure activities.

Cathkin and Champagne Valley (Castle):

Activities offered here include challenging climbs and abseiling opportunities available, while family members can enjoy casual rambles through the spectacular countryside, or fishing, swimming, tubing, horse riding, golf or tennis. Cultural entertainment is provided by the afternoon and evening concerts held by the Drakensberg Boys Choir.

Accommodation: There is an abundance of accommodation in and around Champagne Valley, which include BnBs, self-catering bungalows, cottages, townhouses, chalets, a boutique hotel, a family resort, guest house, caravanning, guest lodge, guest farm, and flatlets.

Monks Cowl Nature Reserve: Monk's Cowl is the access point for the Mlambonja and Mdedelo wilderness areas.

Accommodation: The area features a campsite which accommodates ninety people in a variety of camping and caravan sites. Keith Bush Camp and Cowl Fork campsite. Accommodation generally includes a host of eco resorts.

Lost Valley and Middledale Pass: of historical importance encompassing a 4x4 trail.

Drakensberg Boys' Choir: internationally acclaimed for its unique African repertoire. This choir is a unique South African Experience. The Choir performs every Wednesday at 3:30pm.

Drakensberg Festival of Celebrations: four day extravaganza of music held in December every year

Adventure Sport: include rock and mountain climbing. There is a Champagne Castle – Adventure Centre. Hiking trails offered at most attractions including white water rafting and kayaking, mountain boarding, mountain biking, hiking, horse riding etc.

Team building and conferencing: various conference venues in the resorts and hotels.

Sport: there are four golf courses in Okhahlamba LM namely:

- Champagne Sports Resort
- Monks Cowl Country Club
- Cathedral Peak
- Hlalanathi Berg Resort

Fishing

Birding in Okhahlamba: birding, commonly known as avi tourism is available at the following places;

- Royal Natal National Park with about 180 species.
- Cathedral Peak Area with 130 recorded species
- Monks Cowl, Mdedelelo and Culfargie Nature Reserves with 170 identified species.
- Dragons Peak Park with a variety of water birds
- Falcon Ridge (Black eagle and Lanner Falcon)
- Spioenkop game reserve: in access of 290 species

Arts and Crafts: There is a host of crafters in Okhahlamba and a cultural centre, Mnweni Cultural centre.

Battlefields: Spioenkop Battlefields exists which offers a heritage experience.

Spioenkop Nature Reserve and Dam:

Is used as a venue for water-sports (water skiing, power boating, yachting and picnic sites) in a scenic game-reserve environment. White rhino, giraffe, zebra, wildebeest and a wide variety of antelope and bird species can be found here. The Discovery Trail split into three kilometre and six kilometre loops, winds around the dam's southern shore in an area free of dangerous game. Spioenkop's two electrified campsites, each with fifteen spacious sites, accommodate both tents and

caravans. The campsites share cold-water taps and barbecue facilities with firewood and charcoal for sale. The modern ablutions feature hot baths and showers, flush toilets, dishwashing and laundry facilities²⁵. Hunting is also undertaken at eth game reserve.

Helicopter flights: Available at Dragons Peak and Cathedral Peak hotels.

Drakensberg Canopy Tours: an eco and adventure tourism pursuits of the Central Drakensberg: The Drakensberg Canopy Tour is South Africa's 5th treetop tour, and the 2nd KwaZulu-Natal canopy tour. The tour takes place in the indigenous Blue Grotto forest located on the property of the Drakensburg Sun Lifestyle Resort in the Central Drakensberg's Cathkin Valley.

Current Projects: Okhahlamba Local Municipality has established a Development Agency which has an active tourism component. Current catalytic projects include the Bridge to Nowhere tourism node and junction including a Big Five Game Reserve which is seen to have a provincial impact with buy in and support from National, Provincial and District Municipalities. Other developments include the establishment of a road linking the Champagne Valley with the Cathedral Peak Valley and joining up with an existing road that would link with the roads in the National Park Valley which is envisaged to be 15.6 km and cost R 2 575 000²⁶.

Tintwa Trail/Corridor Project: which encompasses the tarring of roads P341, D364 and D282, which is envisaged to open up opportunities for ± 12 550 people living in Ward 13²⁷.

- Workshop Outcomes

Royal Natal national park hotel should be prioritised. The R 74 is in bad condition and driving tourists away and there is a need to prioritise the maintenance of this road. There is an oversupply of accommodation in certain areas and an undersupply in others such as the northern Drakensberg which has fewer resorts and there is little accommodation near Lesotho. The scenery in Los Valley is underdeveloped and access roads are in bad condition. There is a minority of blacks in tourism and marketing support is needed. An opportunity exists for community based tourism to uplift communities. Synergies need to be created between Drakensberg and Battlefields. There is a dire need to increase the amount of tourism activities offered to tourists. The hospitality industry needs to be grown. Tourists are not spending enough time or money. The Day of Shaka event needs support. Tour operators are lacking in Okhahlamba LM specifically car hire. Five main issues in Okhahlamba are infrastructure, accommodation, increasing routes, increasing the number of tourists, and increasing tour operators. Accommodation is needed for hikers. The Rock Art centre is in need of upgrading. There is a need for information to be provided at the attractions such as Spioenkop. There is a demand for Village tours and the Zulu culture. There is a proud schools programme which aids in creating awareness about tourism.

Strengths	Challenges	Opportunities
Accommodation	Roads	Upgrade R 74
Natural resources	Unskilled communities	Upgrade D 364 as an alternative to Van Reenens pass
N3 & R 74	Water services in Champagne Valley	Upgrade Kwa Mtabamanyama Resort
Plenty human capital	Safety and Security	Create more activities for tourists
Middle black market	Environmental issues	Environmentally sensitive areas

²⁵ <http://www.kznwildlife.com/index.php/?Spioenkop-Game-Reserve-Camping-Caravanning.html>

²⁶ Documents are available for further information and can be accessed from uThukela District Municipality.

²⁷ Documents are available for further information and can be accessed from uThukela District Municipality.

Arts and culture	Bridge at Kwamiya	Increase types of activities
	Visitor numbers are decreasing for conferences, weddings and events	Accommodation
	Lack of tour operators and car hire opportunities	Adventure
	Language barrier	Demand on conference venues
		More tourism education
		Improve number of accommodation as December gets very busy
		Cultural events
		Demand for local tour guides
		Games at Woodstock
Potential Projects		
Rural Village tours		
Development of Routes		
Development Agency		
Sporting activities such as boating in the dams		
More marketing		
Package an investment plan		
Focus on community based tourism		
Publicity		
Nondela (Drakensberg estate (golf courses / shops) owned by the springbok vice captain		
Create more routes and activities		
Enterprise centre		
Impumelelo Craft Centre		

Below is a S.W.O.T compiles taking into account the above mentioned information.

Strengths	Opportunities	Weaknesses	Threats
<ul style="list-style-type: none"> The main strength of tourism in this municipality is being located at the foothills of the Drakensberg World Heritage Site. Availability of natural resources (e.g. veld, flowers and animals) Dedicated and positive attitude of the people Heritage sites Royal Natal National Park Abundance natural attractions and resorts Niche (nature based) tourism is rife in the form of avi-tourism and adventure tourism(helicopter rides etc), as well as 	<ul style="list-style-type: none"> Intensive training of local community Partnerships of tourism role-players Encourage more volunteers in tourism Sustained and combined marketing effort (Product specific) Expansion of Eco and Adventure Tourism Agri-Tourism Zulu Traditional Culture Research and development Newly established hot Air Ballooning activities Build on exploiting inherent varied 	<ul style="list-style-type: none"> Lack of proper infrastructure Heritage sites / routes not developed Lack of tourism skills within the general Community and tourism staff General market unawareness of all that the area can offer. Visitor numbers have dropped 	<ul style="list-style-type: none"> Degradation of the environment, e.g. veld fires and pollution Improper management of infrastructure Crime, especially affecting tourists Lack of co-ordination amongst all role-players Lack of adaptation to market changes and needs

MICE <ul style="list-style-type: none"> Abundance of accommodation - oversupply 	<ul style="list-style-type: none"> experiences linked to eth main 'Drakensberg' attraction Build on adventure ad sports tourism (given the built features such as dams and the golf courses) 		
<ul style="list-style-type: none"> Good accessibility Established tourism market Location of the world's second highest waterfall – Tugela Falls Indigenous cultures (Rock Art) Varied experiences 		Lack of effective co-ordination and networking amongst tourism operators.	
<ul style="list-style-type: none"> Development Agency 			

2.3.2 Tourism Products

In accordance with the tourism system illustrated above, tourism products relates to the tourism components most readily associated with tourism in uThukela District. It is this broad category that forms the crux, and determines the tourist experiences currently offered by uThukela DM. Tourism products include attractions (game reserves, cultural festivals, adventure sports); accommodation; local transport (internal road networks, metered taxis, buses); and hospitality products (restaurants, catering, entertainment such as bars and clubs). If the tourism products are exceptionally good, the tourist will often endure bad tourist channels and even often bad reception in order to experience the attractions themselves²⁸.

2.3.2.1 Attractions

The main attractions in uThukela include the Drakensberg and Battlefields and have been branded accordingly by Tourism KwaZulu-Natal. These two attractions fall under the broad categories of Heritage and Cultural Tourism and Nature Based Tourism. These main attractions encompass various other activities such as eco-tourism, avi-tourism, arts and crafts tourism and adventure and sports tourism. When surveyed respondents indicated that the main types of tourism promoting the district as a tourist destination are at most the nature based activities and tourism, followed by heritage and cultural tourism and the third highest is adventure and sports tourism. Other types of tourism that feature in uThukela in lesser value are Avi-Tourism, game parks, and Arts and Culture Tourism. Given the analysis of the local municipalities, it is evident that the following types of tourism fall within the Battlefields and Drakensberg regions of UThukela. Given the above tourism supply analysis per local municipality, it is clear that each municipality is unique and has varied experiences. This needs to come through in the strategy which needs to focus on experience led tourism rather than destination led tourism, in keeping with the KZN Tourism Master Plan tourism

²⁸ Urban-Econ: Hlabisa Tourism Strategy 2011

experiences are available per LM and prioritising thereof. Taking this into account a summary of the attractions per LM is provided below to place the above information in a district context.

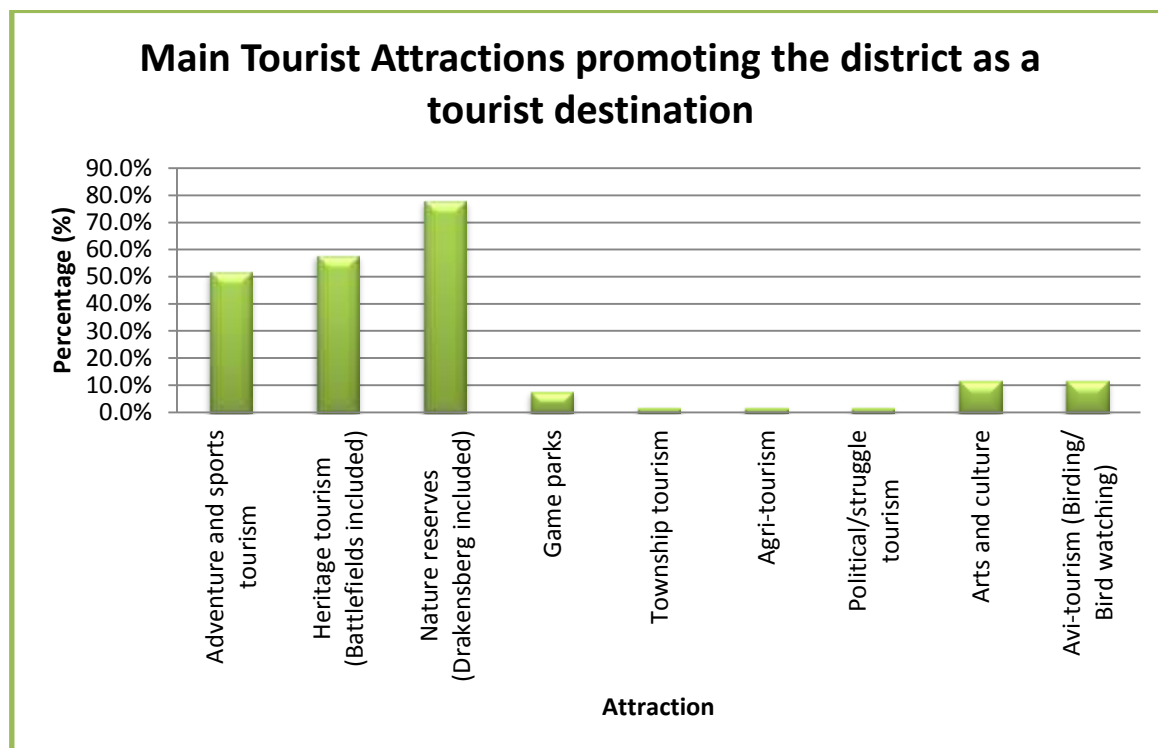


Figure 8 – The main attractions promoting uThukela District as a Tourist destination (Source: Urban-Econ Online Survey)

Given the above analysis, the main tourism designations that exist in uThukela are:

- ✓ Nature Based Tourism (Seen as a core experience according to the KZN Tourism Master Plan)
- ✓ Niche Tourism
 - Adventure Tourism
 - Avi - tourism
 - Arts and Crafts Tourism
 - Cultural / Historical / Religious Tourism

This section deals with the major tourist attractions which define uThukela and the experiences that it has to offer. In keeping with the PGDS the aim is to create a varied experience and the attractions will therefore be characterised into tourism market segments. It is important to understand what an area offers in order to market and provide unique and established selling points as well as to suggest new products which have potential to be developed and grow the tourism experience. Tourism attractions relates to the supply of tourism products in the district.

Below is a map which places the attractions in a spatial context. It is clear to see that the municipalities with the most concentrated activities are, Okhahlamba, Imbabazane and Emnambithi. Indaka is shown to have no tourist attractions.

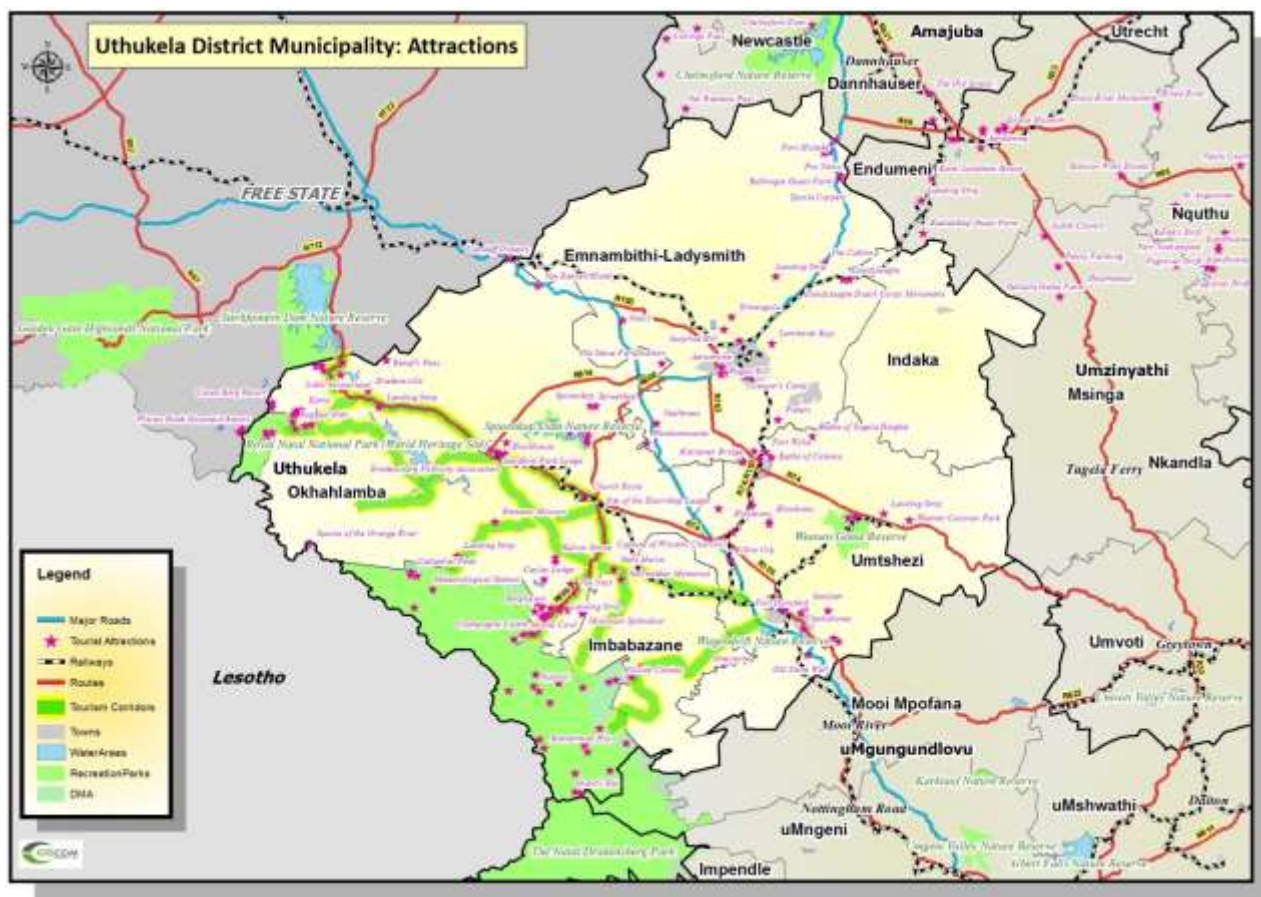


Figure 9 - Tourist Attractions across UThukela District (Source: GISCOM and UThukela GIS)

2.3.2.1.1 Nature Based Tourism

Nature based tourism in UThukela one of the major draw cards. Nature based tourism is deemed a core experience through the KZN Tourism Master Plan and should therefore be mainstreamed. The main attraction with this regard is the UKhahlamba Drakensberg World Heritage site. Nature based tourism allows for conservation and eco-tourism (as well as green tourism) which contribute toward sustainable tourism development. This is important in order to sustain the natural environment for present and future generations. Sustainable tourism is prioritised at National and provincial level through the various legislation and policies as described in the contextual analysis above. It is important to note that sustainable tourism is not confined to the natural environment, but deals with the social implications and economic implications to the surrounding communities and therefore means integrating all three spheres to be taken into regard when making decisions and planning for developments. Nature based tourism relates to protection and appreciation of the ecosystems and biodiversity of environmentally sensitive areas. Hiking and nature based activities are also generated from these attractions. Nature Based tourism includes niche tourism experiences such as avi-tourism and adventure tourism.

Nature tourism is not only an important strategy for rural tourism, but for assisting in preserving the natural environment and pristine areas in rural areas where there is little to no land use management and much degradation such as the case of Indaka LM. Sustainable tourism in UThukela is only recently coming to grips with creating tourism that benefits the local communities. There is a need for communities to become involved and aware of tourism and the economic potential as well as the social responsibility. Nature based tourism includes niche tourism including avi-tourism and wildlife tourism.

The benefits of managing natural assets sustainably include:

- At the national interest level, natural asset-targeted tourism impact management approaches will help South Africa maintain its competitive edge in “green tourism”;
- At a central governance level such approaches will help South Africa fulfil both international and national obligations and strategies; and
- At the industry operational level such approaches will help ensure that the South Africa tourism industry remains profitable and can expand in a sustainable manner.

At the local government level such approaches will:

- Assist councils in meeting quadruple-bottom-line (environment, social, economic, cultural) reporting objectives
- Assist councils in meeting the sustainable development requirements of the as stipulated in the White Paper on Local Government (1998)
- Reduce the likelihood of litigation, costly remediation and other reactive measures that tie up valuable council resources
- Send pro-active leadership and guidance signals from local government to the various tourism sector groups in South Africa
- Provide a sharper focus for councils in the management of both tourism and recreational activities in the their districts and regions

The map below depicts the recreation parks and natural features which lie within uThukela District. These natural areas consist of mainly Ezemvelo KwaZulu-Natal Wildlife areas.

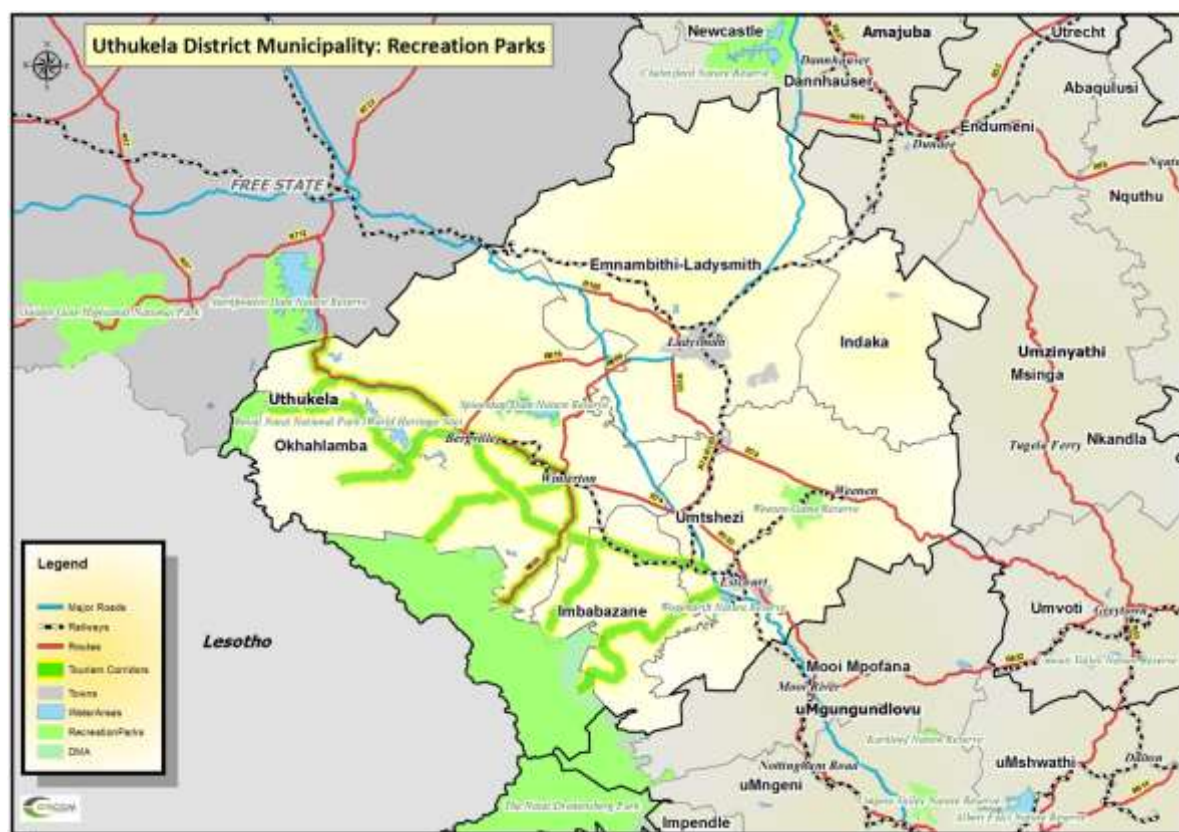


Figure 10 – Map depicting the recreation parks in uThukela District (Source: GISCOM and uThukela GIS)

The main natural attractions at the UKhahlamba Drakensberg World Heritage site are tabulated below all showcasing the natural splendour of the Drakensberg scenery with transcending waterfalls valleys and peaks amongst other activities such as adventure sport and viewing San Painting and bushman art as described previously:

Local Municipality	Attraction
Okhahlamba LM	<ul style="list-style-type: none"> The Royal Natal National Park Amphitheatre Tugela Falls Cathkin Peak and Champagne Valley, Cathedral Peak and Didima Valley, Lost Valley and Middledale pass,
Imbabazane LM	<ul style="list-style-type: none"> Giants Castle Injisuthi White Mountain

2.3.2.1.2 Nature and Game Reserves

UThukela has a range of nature and game reserves which include Ezemvelo KZN Wildlife²⁹ managed and protected areas. Game reserves offer vast wildlife experience. UThukela contains a Big Five game reserve which is important for drawing tourists from all parts of the world and South Africa. The more famous known reserves are mentioned below, however, many resorts and lodges have citing's of wildlife and a number of plant and bird species.

Local Municipality	Nature Reserve	Game Reserve
Imbabazane LM	<ul style="list-style-type: none"> -Hlathikhulu Crane and Wetland Sanctuary -Hillside Nature Reserve 	-Giants Castle Game Reserve
Okhahlamba LM	<ul style="list-style-type: none"> -Monks Cowl Nature Reserve -Rugged Glen Nature Reserve 	<ul style="list-style-type: none"> -Spioenkop Game Reserve -Kwaggashoek Game Reserve
UMtshazi LM	<ul style="list-style-type: none"> -Thukela Biosphere -New Formosa Nature Reserve -Moor Park Nature Reserve -Wagendrift Nature Reserve 	-Weenen Game Reserve
Emnambithi LM	Ingula Wetlands	<ul style="list-style-type: none"> -Nambiti Game Reserve -Trenchgula Guest Lodge & Game Farm -Emnambithi Game Reserve
Indaka LM	-	-

Tourism Products administered by Ezemvelo KZN Wildlife include(also shown on the map above);

Local Municipality	Attractions
Imbabazane LM	<ul style="list-style-type: none"> Giants Castle Garden Castle
Okhahlamba LM	<ul style="list-style-type: none"> Royal Natal National Park Spioenkop Nature Reserve Monks Cowl Nature Reserve Didima

²⁹ Ezemvelo KZN Wildlife is a governmental organization responsible for maintaining wildlife conservation areas and biodiversity in KwaZulu-Natal Province.

Emnambithi LM	
UMtshezi LM	<ul style="list-style-type: none"> • Wagendrft Nature Reserve • Weenen Nature Reserve
Indaka LM	-

There are many dams that exist in UThukela which also offer a wide range of activities including power boating, fishing, picnicking etc.

Local Municipality	Dams
Imbabazane LM	-
Okhahlamba LM	<ul style="list-style-type: none"> • Spioenkop Dam • Woodstock Dam • Kilburn Dam • Driel Dam
UMtshezi LM	<ul style="list-style-type: none"> • Wagendrft Dam
Emnambithi LM	<ul style="list-style-type: none"> • Windsor Dam • Qedusizi Dams
Indaka LM	-

2.3.2.1.3 Birding/Avi-Tourism

UThukela with the Drakensberg as a conservancy boasts a number of activities, as seen from the discussion on what the Drakensberg has to offer above, one of these being the niche area of birding more commonly known as avi-tourism³⁰. The following table lists the birding tourism opportunities available in UThukela DM, there are also a range of loges and resorts which involve bird viewing. Avi-tourism or birding is common in UThukela as there as many sites with varied bird species, however it is unclear if guided bird tours exist. This is a highly specialised field and therefore people will need to be trained to provide birding tours. This could be a potential area for employment creation which will in addition need appropriate marketing, exposure and advertising of this niche area.

Local Municipality	Birding
Imbabazane LM	<ul style="list-style-type: none"> • Hlathikhulu Crane and Wetland Sanctuary • P9 Birding route • Bird watching at Giants Castle
Okhahlamba LM	<ul style="list-style-type: none"> • Royal Natal National Park with about 180 species. • Cathedral Peak Area with 130 recorded species • Monks Cowl, Mdedelelo and Culfargie Nature Reserves with 170 identified species. • Dragons Peak Park with a variety of water birds • Falcon Ridge (Black eagle and Lanner Falcon) • Spioenkop game reserve: in access of 290 species
UMtshezi LM	<ul style="list-style-type: none"> • Weenen Nature Reserve has over 250 bird species

³⁰ Avi tourism, said to be one of the most powerful conservancy tools for birdlife habitat is fast becoming a key area of tourism in South Africa. Avi-tourism has immense potential to become a driver of local economic growth for local communities. This niche market is a sub category of nature based tourism and has also been identified by the Department of Trade and Industry as a fast growing niche tourism sector, which prompted a research document on Avi-Tourism in South Africa and opportunities and recommendations thereof.

Emnambithi LM	<ul style="list-style-type: none"> • Malandeni Bird Sanctuary • Ingula Wetland
Indaka LM	-

2.3.2.1.4 Adventure and Sports

Adventure and sport is one of the main reasons for visiting UThukela DM as there is a wide range and variety of adventure activities and sport to enjoy. The district can favourably be promoted in this sense. Adventure sport includes rock and mountain climbing. There is a Champagne Castle – Adventure Centre. Hiking trails offered at most attractions including white water rafting and kayaking, mountain boarding, mountain biking, hiking, horse riding etc. Canopy Tours is also famous for tree top tours and eco adventures. The range of activities is offered throughout UThukela, with the exception of Indaka. Nambiti Game Reserve, for instance has hosted the South African White Water Championships. Throughout the Drakensberg and major attractions as mentioned above, adventure activities are offered, from hiking to mountain climbing, nature trails, water sport at the dams and lakes etc. Helicopter rides are offered at Dragons Peak and Cathedral Peak hotels as well as Nambiti Game Reserve. A recent hot air ballooning initiative has been initiated near Winterton. With regard to sport facilities, UThukela contains a number of golf courses for both experienced serious golfers to social golf players as shown in the table below.

Local Municipality	Golf Course
Okhahlamba LM	Champagne Sports Resort – 18 Holes Monks Cowl Country Club – 9 Holes Cathedral Peak – 18 Holes Hlalanathi Berg Resort – 9 Holes
UMtshazi LM	Estcourt – 18 Holes
Emnambithi LM	Ladysmith - 13 Holes
Indaka LM / Imbabazane LM	-

2.3.2.1.5 Culture / Heritage / Historical / Religious Tourism

This type of tourism is where the products and services that are of interest to the visitor reflect the customs, traditions, heritage, history and way of life of the local residents of the area. Heritage is non-renewable, UThukela is bursting with cultural and heritage products. This tourism experience is deemed as secondary to the core experience of nature based tourism by the KZN Tourism Master Plan. Among the most renowned are the Battlefields history and various sites within uThukela. Cultural products run throughout the local municipalities with Ladysmith being an important centre for this activity. The Spioenkop Battlefields is another important Battlefield and is managed by

AMAFA. The map below depicts the Arts/culture/historic attractions within uThukela District.

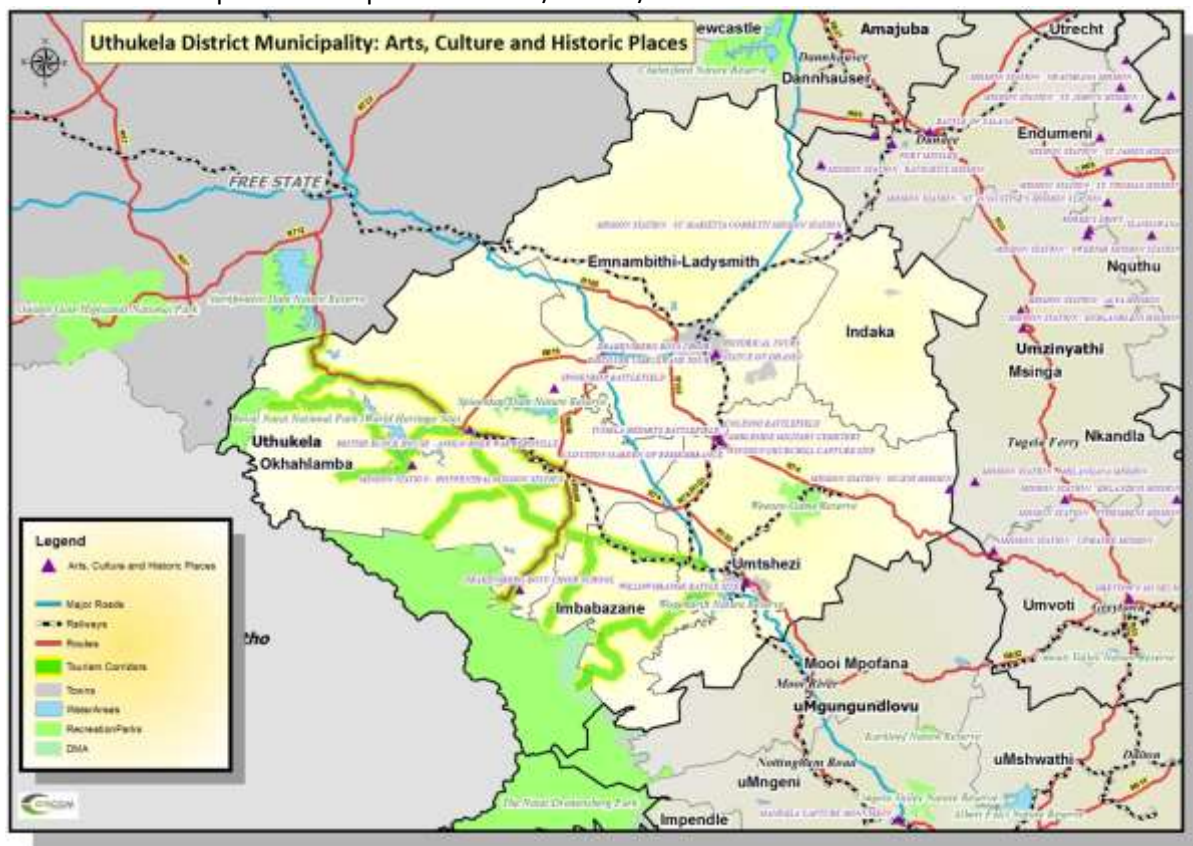


Figure 11 – Map depicting Arts, Culture and Historic Attractions in uThukela District (Source: GISCOM and UThukela GIS)

2.3.2.1.5.1 Battlefields

The Battlefields cuts through three local municipalities in uThukela, namely Emnambithi LM, uMtshezi LM and Okhahlamba LM, with Emnambithi having a more pronounced mix of Battlefield products mentioned below. This internationally popular and established attraction has been branded by Tourism KwaZulu-Natal, and falls within the uThukela region, with a variety of Battlefields and historical sites ranging from early Zulu Wars early Zulu Wars through the Boer and Zulu conflicts, the Anglo-Zulu War, the Zulu Civil War, the Transvaal War of Independence, the Anglo-Boer War and the Bambatha Rebellion. International tourists mainly consist of people from European origin due to the Colonial British history of South Africa, however, there is a small niche market for this attraction which as seen through the Emnambithi Tourism Strategy of 2005, the core market is slowly dying out and according to stakeholder consultation, the amount of international tourists have declined and domestic has increased from 95% British to 76 % South African. If the challenges are not met, this niche tourism sector can eventually fade.

The importance of the Battlefields lies in the contribution to South African history. UThukela District contains a large number of sites relating to both the Voortekker settlement of the area in 1838 – 1842 and then the Anglo Boer Battles around Ladysmith. The most popular sites are those related to the Anglo Boer War and of those the more commonly visited are:

- The Siege Museum in Ladysmith,
- Spioenkop in Okhahlamba LM,
- Platrand in Emnambithi LM,
- Colenso in Emnambithi LM and,
- Thukela Heights in Emnambithi.

The main challenge is that visitor numbers are decreasing, with a decreasing international audience. The challenges highlighted with regard to the Battlefields by the Battlefield Routes Association include access to the sites which is in poor condition with very limited or unmaintained signage which hinders tourists from so much as finding the attraction. Tour guides are necessary to direct visitors through the Battlefields experience as visitors are unable to find their way around. This can be seen by the road to Spioenkop Battlefield which is in terrible condition and bus drivers are turning back after refusing to drive along it, hence driving tourists away. Generally the signage and roads are in poor condition which drives tourists away.

The impression is that there are not many visitors coming to the Battlefields. Preference is given to maintaining sites which attract a substantial amount of visitors. This indicates that the visitor numbers are low for uThukela Battlefields sites. A key contributing factor is that the area is not marketed as well as it could be and people are moving towards wanting a varied experience other than the Battlefields. In general, the Battlefields sites are unkempt and will soon become an eyesore if action is not taken (with overgrown grass etc.); this can be seen for example in Colenso at the Gun Sites, Platrand and Tukela Heights. If the battlefields brand is to be sustained then maintenance and attention should be given to these sites. The same is the case with Clouston Kopie which contains the Clouston hill which is the site of Gen Buller's headquarters. Another major challenge is that there is limited signage from the 3 leading to the Battlefields. The local communities should be involved in the preservation of the history of uThukela.

A possible way to include them in cultural and heritage tourism is to educate them about the history and to then train them as local tour guides which could be run as a programme for the youth³¹. The fact that the Battle of the Thukela Heights was the biggest battle fought by the British in Africa until WW2 and the biggest battle they fought in the Southern Hemisphere until the Falklands War as indicated by local tour guides and historian, is indication enough that uThukela is rich in history together with the vast amount of monuments, Battlefields and historical sites. The Battlefields should not only be preserved and maintained but products need to be developed to enhance the heritage and historical experience by creating themed activities such as military camps. Also, it is important that as mentioned above the local communities benefit from heritage and historical tourism. Information gathered suggests that 5000 people are employed in the greater Battlefields Region.

With regard to heritage and history in uThukela DM, a host of national and international events are held which demonstrated the contribution to the heritage and history of the area, more specifically on the Battlefields history. This will be discussed later in the report. The point is that if the attraction can sustain itself, as well as through events which bring great exposure to the area and heritage of the area, this will increase visitor numbers immensely. If visitor numbers are increased, and are satisfied with the experience then the area becomes automatically marketed by word of mouth which is an important marketing tool for international tourists. One of the main challenges is marketing of the area.

Awareness also needs to be improved in local communities not only about the Battlefields but tourism as a whole. Key Battlefield and historical sites have been identified which include but are not limited to³²:

³¹ Local Historians are willing to aid with training

³² There are about over 30 more historical sites in uThukela including the Old Stone Wall in Estcourt and Surprise Hill in Emnambithi LM.

Battlefield Site	Local Municipality
Spioenkop Battlefield	Emnambithi LM
Battle Of Wagonhill	Umtshezi LM
Vaalkrans	Emnambithi LM
Battle Of Tukela	Emnambithi LM
Battle Of Colenso	Emnambithi LM
Clouston Garden Of Remembrance	Emnambithi LM
Ambelside Cemetery	Emnambithi LM
Winston Churchill Capture Site	uMtshezi LM
Willow Grange	uMtshezi LM
Ladysmith Relived	Emnambithi LM
Chieveley Gravesite	uMtshezi LM
Fort Dunford	uMtshezi LM
Monuments and Historical Sites	
Bloukrans Memorial(1938)	uMtshezi LM
Augustinian Chapel(1929	uMtshezi LM
Brynbellla-Willowgrange	uMtshezi LM
Chieveley Military Cemetary	uMtshezi LM
St. Matthews Anglican Church	uMtshezi LM
Old Civic Buildings-Bushman's River Tourism Association.	uMtshezi LM
The First Government School	uMtshezi LM
Greystone	uMtshezi LM
Old Magistrate's Residency	uMtshezi LM
Old Natal Government Railway Bridge	uMtshezi LM
Veghtlaager(Veglaer)	uMtshezi LM
Zaailaager	uMtshezi LM
Kidston Memorial	Van Reenen – Emnambithi LM
MoorDraai Gravesite	Van Reenen – Emnambithi LM
Swinburne Bridge	Cross border
Museums	
Fort Dunford Museum	uMtshezi LM
Weenen Museum	uMtshezi LM
R.E Stevensons Museum(old toll house)	Emnambithi LM
Moth Museum	Emnambithi LM
Siege Museum	Emnambithi LM
Emnambithi Cultural Centre	Emnambithi LM
Winterton Museum	Okhahlamba LM
Bushman cave Museum	Imbabazane LM

• Museums

There are 7 museums in uThukela concentrated in uMtshezi LM and Emnambithi, with only one in Okhahlamba LM. These LMs are famous for the Battlefields and heritage/cultural tourism, whereas Okhahlamba is famous for the Drakensberg which relates to nature and adventure tourism. Funding has been applied for, for a museum and tourism office in Imbabazane. The most popular museum as indicated by visitor statistics is the Winterton Museum followed by the Seige Museum both reflecting on culture and heritage. The location of these museums suggest that these areas are the most visited as well, that being Emnambithi and Okhahlamba LMs.

• Sites Declared by Amafa³³

³³ Information provided by Amafa

The object of Amafa KwaZulu-Natal is the conservation, protection and administration of the heritage resources of the Province within the terms of the KZN Heritage Act of 2008 Act and to generally promote and coordinate heritage conservation for the benefit of present and future generations³⁴. Amafa administer several heritage sites and the following fall under uThukela District. They are the legal provincial custodians of KZN heritage resources. The following heritage resources are to be generally protected, conserved and administered by Amafa KZN in terms of Chapter 8 of the Amafa KZN Heritage Act (No. 4 of 2008):

- Structures; and buildings over 60yrs
- Graves of victims of conflict;
- Traditional burial places;
- Battlefield sites, archaeological sites, rock art sites, paleontological sites, historical fortifications, meteorite and meteorite impact sites.

All together there are 33 recorded AMAFA sites in uThukela District. Amafa sites are evident in Emnambithi(14), UMTshezi(14) and Okhahlamba local municipalities(5). This indicates a strong heritage influence in uThukela. The only site managed by AMAFA is the Spioenkop Battlefield which has decreased in visitor numbers possibly due to the challenges highlighted above. Again judging from the amount of sites of heritage importance as identified provincially, it can be seen that uMTshezi, Emnambithi and Okhahlamba (although the least) are the major pull areas for heritage and historical tourism. There are two recently AMAFA declared sites in Imbabazane LM.

Emnambithi Local Council	UMTshezi Local Council	Okhahlamba Local Council
Railway Institute, 316 Murchison, Lady Smith	Bulwer Bridge and Old Toll House, Colenso, Estcourt District	Spioenkop, Battlefield, Farm Rhenoster Fontein.
Town Hall, Murchison (Cnr Queen) Street, Ladysmith	Fort Dunford, Kemps Road, Estcourt	
The Residency, 11 – 13 Wright Road, Ladysmith	Old Agricultural Hall, Harding Street, Estcourt	Mhlwazini Cave 2829CD57, Farm Solarcliffs 11454 Bergville
Platrand Battlefield (“WagonHill”), Farm Fourie’s Kraal 1183(Riet Kuil 1067), Klip River District	Bloukrans Battlefield, Farm Rama 929, Estcourt District: Bloukrans Memorial	Anglo-Boer War, Blockhouse, Sharrat, Street, Bergville
Fort Mistake, Farm Quagga’s Kirk 1168, Klip River District	Saailaer, Farm Zaay Lager 1199, Estcourt District	Retief’s Pass, Hoek 11337 and Bethel 2186 Mgoduyanuka, Bergville
Llandaff Oratory, Van Reenen, Klip River District	Greystone, Farm Vegt Lager 801, Estcourt District	
Elandslaagte Battlefield, Farm, Brakfontein 1046, Klip River District	Brynbella Battlefield Stone Wall, Farms Glenbello and Stockton, Estcourt District	
Elandslaagte Battlefield: Dutch Corps Monument	Settler Cottage, 87 Lorne Street, Estcourt	
Hindu Thirukootam and ShreeGanaser Temple, 113 Forbes Street, Ladysmith	Bartle House, St Gregory College, Estcourt District	
Keer Weder, 25 Keate Street, Ladysmith	Hattingsvl akte 2829DD19 and 22, Farm District	
Soofie Mosque and Maddressa, 41 Mosque (Soofie) Street, Ladysmith	Ambleside Military Cemetery/National Garden of Remembrance	
Dutch Reformed Church, 103 Murchison Street, Ladysmith	Coolamgaus Building, Retief Street, Weenen	
Hime Bridge, Farm Platberg 1241, Klip River District	Abdoolgafoor Goolamsahib Arabian Merchant Retief Street, Weenen	

³⁴ KZN Heritage Act 2008

Other important historical attractions

• San Paintings / Rock Art:

The Drakensberg vicinity is famous for rock art and san paintings. In the entire Drakensberg area, there are over 30 000 paintings. Imbabazane and Okhahlamba local municipalities contain the San paintings and Rock Art and Bushman's Paintings at Giants Castle and the cave at Royal Natal National Park. Viewing of bushman's paintings is also available at Sigubundu Valley near the Royal Natal National Park in Okhahlamba LM. The proposed Dinosaur Valley project should also be noted. There is also a recently established San Art Centre. Battle cave at Injisuthi also boasts Bushman Rock Art.

• Religious Places of Interest:

There are various religious sites such as the Soofie Mosque in Ladysmith, Smallest Church in the World at Van Reenen, Maria Ratschits mission and St Josephs Mission, All Saints Church: built in 1902 and the Statue of Ghandi all in Emnambithi LM. Given the amount of religious sites, there exists the potential for a religious route to be developed in Emnambithi which links top Van Reenens Smallest Church in the world. The map below depicts the places of Worship in uThukela District.



Figure 12 – Map depicting Places of Worship in UThukela District (Source: GISCOM and UThukela GIS)

• Cultural Villages/Centres

Cultural villages in UThukela DM include the proposed Mazibuye Emasisweni Cultural Village in Imbabazane, the Mnweni Cultural center in Okhahlamba and opportunities for cultural villages in Indaka to highlight the Zulu culture and tradition and to expose the community in terms of arts and crafts. Another is the Weenen Cultural Theme Park. The Emnambithi Cultural/Art Center is a current project, which entails upgrading the Railway institute building and contains a tourism visitor center, arts and craft center, the Ladysmith Black Mambazo Center (Theatre of Dreams), has exhibition

space and coffee shops. Cultural villages are said to not realize their full potential. This is a challenge that needs to be dealt with. An opportunity exists for a cultural village within Northern Drakensberg.

- **Zulu Culture and Tradition;**

The inherent rural nature of the district and local municipalities creates an opportunity for Zulu themed tourism activities as discussed in the previous sections. There seems to be a great demand for rural and township tourism. Tourists indicate the need to explore the Zulu culture and the traditional way of life.

- **Cannibal Caves**

These caves are available at Royal Natal National Park and a recent Cannibal route in Indaka LM. There are a variety of other caves in Okhahlamba and Imbabazane forming part of the Drakensberg World Heritage Site which offer shelter to hikers.

Heritage and culture provide an opportunity to stimulate the interaction and involvement of local people and cultures which can assist in supporting the local economic environment and creating a holistic and meaningful tourism experience for the visitor.

2.3.2.1.6 Meetings, Incentives, Conferencing, Events

Business tourism, conferencing and events are growing sectors in UThukela DM. Ladysmith for example hosts a range of events from domestic to international (See Annexure 6). Exposure and advertising although limited, is done through local newspapers, press releases in provincial newspapers and through embassies for international events. There is indication that there is potential demand for events tourism in uThukela, through the mentioned events therefor this needs to be fostered and grown. The challenge however, is a lack of funding for advertising. Events could also help with exposure to the other tourism assets in and around uThukela and could increase future visitor numbers.

Also, advertising should be done collectively for the district which will provide some order as to where and how to advertise as well as a subsidised rate. A marketing and advertising strategy needs to be formulated in order to provide a uniform exposure to varied markets. Imbabazane is also famous for events, well known events include the White Mountain Music Festival (the LM is responsible for financing a portion of the event), Mountain Bike Challenge at Giants Castle held in April, and the Comeback Outdoor Challenge. Okhahlamba also hosts the Drakensberg Festival of Celebrations. Various resorts, lodges and hotels contain conference facilities which are in great demand. There is potential for a conference centre in Emnambithi LM. Team building could also be promoted due to activities offered.

2.3.2.2 Arts and Craft / SMME Development

The Arts and craft sector relates directly to SMME development in uThukela. Co-operative development has proven successful for not all but many coop initiatives such as the craft sector. There is potential to further create SMME development among the local people of uThukela. The two main acts of UThukela are the world renowned Ladysmith Black Mambazo, and Drakensberg Boys Choir which needs to be marketed as a draw card for the district. Tours are held which allows visitors to experience where the members of eth Ladysmith Black Mambazo grew up and schooled. The Drakensberg Boys Choir performs every Wednesday.

2.3.2.2.1 Craft Co-Operatives in UThukela District

An interview with the LED manager indicated that uThukela District assists crafters with advice and skills development, marketing and to link with organisations for mentoring. The available database consists of 54 cooperatives³⁵. However, these are the only the cooperatives which approach the municipality for assistance. There is a strategy for craft development which was funded by Gijima. The crafters are exposed to trade fairs and workshops, and attend craft exhibitions such as Gateway Shopping Centre, Cape Town, Durban, ICC and Exhibition Centre, the Royal Show, Reed dance (King Zweletini Royal Residence. The crafters also exhibit internationally in India, South Korea, Spain, and Reunion Islands etc. Since the cooperative did not have email addresses telephonic surveys were carried out with a 40% sample size to gain an understanding of the tourism related sector. The heritage Committee is a tourism organisation involved in battle field campaigns, music and entertainment.

- They work together with the Emnambithi Municipality in community development projects where they encourage young people to be involved in arts and culture.
- They approach the youth by trying to mobilise and eradicate crime.
- As part of their development objectives they are also involved in training the members for live arts performance and they also do workshops for school teachers as to encourage them to form school choirs involved in school choir competitions.
- There is potential for growth as they have also been involved in such projects in Dan Hauser and Indaka Local Municipality.
- They also have a database of the list of members.

They are currently using the Municipal offices while they look for their own office.

This holds positive for the future of arts and craft in the district and such initiatives should be carried throughout the district in order to educate, create awareness and motivate people to become involved in arts and craft.

With regard to tourism related services, uThukela district has established a craft marketing and development strategy. Through partnership with Gijima KZN the district is embarking on craft projects with an aim of formalising this sector. Crafters within uThukela district municipality engage in a variety of craft products, and these can be summarised in clothing / sewing, accessories, grass work and others. A Secondary craft co-op was established in 2009 to assist with marketing, training and networking of primary co-ops. uThukela district municipality had played a major role in supporting the crafters to take part to a number of exhibitions like Derox Cape Town, Kizo Art Gallery. Sinothando from Weenen and Sinothando-Lusanda from Emnambithi won awards in the 2010 soccer World Cup event. The craft sector in uThukela is quite established and this needs to be exploited through arts and craft tourism.

The Department of Arts and Culture is currently involved in uThukela through multicultural exhibitions which include craft, visual arts and performing arts exhibitions as well as food testing and cuisine. The current budget is only R 200 000. The DAC has expressed concern and need for craft hubs within the district.

2.3.2.2.2 Performers

Performers were contacted although there were not many contact details available. They have no relationship with the municipality or the department of Arts and Culture. They perform for the local community at weddings and at family ceremonies (none of them are tourist related). Only one out of 7 performers has done something that is tourism related, Omama Benhlonipho they are a group of Zulu dancers in Ladysmith. They have been operating since the 1990's and they have received

³⁵ Please see annexure for the list of craft coops and a breakdown of the interviews held with each.

funding from the department of Arts and Culture, they have got invites to perform at tourist sites and at events around UThukela. They have complained that they receive not assistant from the municipality, they have tried contacting the municipality but they got no response.

Below is a list of performers within Emnambithi LM.

Organization Name	Contact person	Cell/ Tel	Description
Traditional Music & Dance			
Bambanani Zulu Dance	Sthabiso Mbatha	071 284 3949	Indlamu, Inkwahla and ushameni
Young Lions – Amawundlu	Nathi Zulu	083 771 3086	Indlamu
Imbalenhle Zulu Dance	Sipho Nkabinde	083 335 3786	Indlamu, Inkwahla and ushameni np mzansi
Abaqapheli	Paul	082 972 4320	Maskandi
Mas'Majik	Masibonge	079 795 3253	Umbhaqanga
Izohlabani	Mfundo Khumalo	071 033 3320	Maskandi
Ladysmith Loving Boys	Nkosinathi Khumalo	083 984 9583	Isicathamiya
Abafana Besicephu	Sinenhlanhla Mswane	071 233 3350	Indlamu
Ladysmith Omama Bokuthula	Tsheliwe Shabalala	073 643 1412	Isigekle – ingoma yomama
Indukenhle	Andile Hadebe	036 634 6080	Inkwahla – ingoma yamantombazane
Siyakhula	Thokozile Mkhwanazi	073 338 9581	Zulu Traditional Dances
Amangwane Zulu Dance	Nosihle Mbatha	083 502 8714	Zulu Traditional Dances
Mbumba theatre	Xolani Zondo	071 401 1624	Zulu Traditional Dances
Amacelebrity		084 8753948	Maskandi
Njabuliso	Njabuliso Khumalo	072 947 7918	Playing Guitier
Ondida	Ngane Mkhize	072 276 4249	Zulu Traditional Dances
Nhlakanipho	Nhlakanipho Duma	073 662 9493	Zulu Traditional Dances
Hip Hop Music & Dance			
	Andile	073 622 3022	Hip Hop Music
	Lunga	071 722 4084	Hip Hop Music
Ryming & Hip hop Artist	Smanga Nsele		

2.3.3 Accommodation and Hospitality

The area most lacking in accommodation facilities is Indaka LM. It was indicated that there is potential for increased accommodation development in Imbabazane. Emnambithi LM is growing with regard to accommodation, mainly through BnBs and guesthouses. Annexure 6 provides an inventory of all listed accommodation in UThukela. UMtshezi has a fair amount of accommodation as seen through the local municipality analysis. Okhahlamba has the most amount of accommodation with more guesthouses, lodges, resorts and BnBs, camps and caravan parks. There is said to be an oversupply of accommodation in Okhahlamba. Majority of the service providers who completed the questionnaire were accommodation facilities. There are 50 recorded caterers in Ladysmith; however, information is not recorded with regard to other LMs, which makes it a difficult task to gather a database. The map below depicts the range of accommodation supplied in uThukela spatially. However, this is purely indicative. There is a vast range of other accommodation available as seen in Annexure 6. Revitalisation of the old Royal Natal National Park Hotel should be considered as a developmental necessity as suggested by stakeholders. With regard to grading, it was found that grading is an issue and standards need to be set.



Figure 13 – Accommodation offered in uThukela District (Source: GISCOM and uThukela GIS)

2.3.4 Support Services

Support services are social services which are not necessarily designed for tourists, or necessary for tourist visits, but complement and add to the efficiency and convenience of the tourist experience. Tourists may take these services for granted if they are from well developed countries. Examples include ATMs, petrol filling stations, and health and safety services. Supporting services are imperative for the effective functioning of the tourism industry in uThukela DM. The results from the online survey illustrated below depict the additional supporting infrastructure which respondents felt is lacking. The highest ranked is hard infrastructure in the form of signage and roads followed by information and cultural centres. This section is broken down into hard and soft infrastructure tourism channels. Hard tourism infrastructure relates to physical transport infrastructure, and other tourism infrastructure such as signage and information centres.

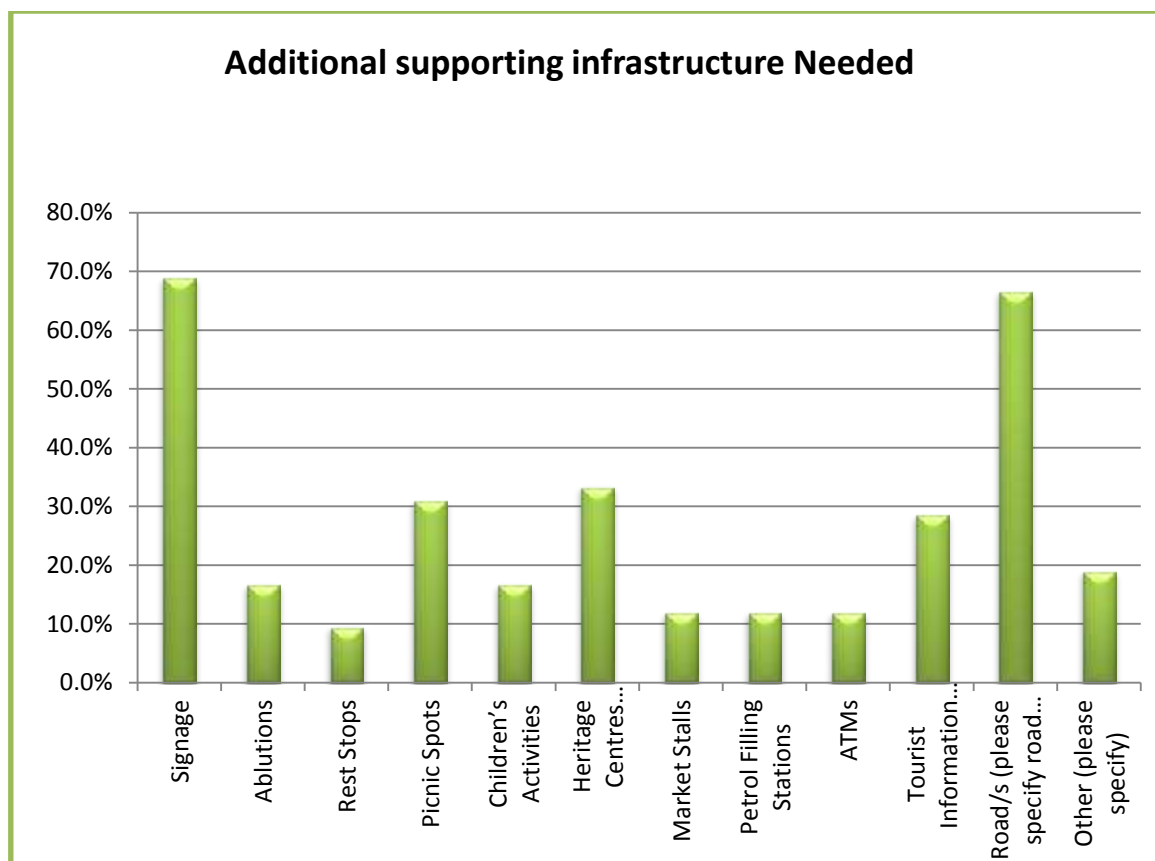


Figure 14 – Additional Supporting Infrastructure needed to improve tourism in uThukela (Source: Online Survey by Urban-Econ)

2.3.4.1 Tourist Channel: Hard Infrastructure

Hard infrastructure relates to accessibility and ease of movement in and around a tourist destination. It relates to how visitors physically get around. It also relates to supporting infrastructure such as information and communications technology and tourist information centres. The types that are of relevance to uThukela are roads, air and rail transport, signage, ICT and tourism information Centres. The map below visually depicts the linkages spatially.



Figure 15 - Map depicting linkages in and around uThukela District (Source: GISCOM and UThukela GIS)

- Road Infrastructure:**

The major transport networks traversing uThukela are the N3 and N11 National Roads. The N3 is relatively good condition and has signage relating to the Drakensberg World Heritage site. It however, does not have signage relevant to the Battlefields. The N3 is a major strength for the district due to the vast amount of people frequenting the routes and the importance of the route as a direct linkage between the two major economic centres of Gauteng and Durban, which automatically implies the linkage from King Shaka International Airport and the Durban Harbour. The N11 is also an important inter regional linkage as it links uThukela to the surrounding district of Amajuba. These linkages are easily accessible from King Shaka International Airport, therefore providing ease of movement to the district. The N3 also traverses the Midland Meander Route which is a successful tourism route in KZN. The N11 is currently under construction; however, this is affecting tourism in uThukela as passers-by are discouraged by the 20 minute wait at the stop and go.

There are many regional linkages within the district linking the surrounding provinces and countries. An important transport network is the R74, which links the Drakensberg to the Free State and creates accessibility for tourists arriving from Gauteng. This road is however in disrepair. It should therefore be a priority to fix this road as it is jeopardising the flow of tourists into uThukela District and hence adversely affecting local tourism.

Other strong linkages as discussed in the spatial analysis are R103, R616 and R600. These roads provide linkages in and around uThukela DM. The R103 links Emnambithi to Umtshezi. The R600 links Okhahlamba to Emnambithi LM. The only local municipality excluded from this network is Indaka, however, it should be noted that Indaka has internal provincial roads which link to the N11

and N3. It can be concluded that the road network is generally favourable in uThukela DM. Suggestions for road improvements by local stake holders include:

Suggestions for road improvements
All access Roads need Maintenance - in Estcourt and Surrounds(the Giants Castle area)
R74, D119, R616 and R600 needs repairs - in Bergville and Northern Drakensberg
Cathedral Road in Winterton needs repairs
R74 through to Harrismith & the Gulluksberg Pass
R73, R616, R600, Spioen Kop battle site, Retief Klip/ Barefoot Woman Monument, Bloukrans
R600,D53,D277 need pothole repair and the Bridges need repair in D3 and D277
The dirt roads to Geluksburg need repairs
Bad road to Spioenkop, tourist cars unable to go there
All district roads are in a shocking condition. R 600; D 53; D184 - in Winterton and Central Drakensberg

• Air Transport Infrastructure

There are five landing strips in uThukela district as shown on the Tourism Attractions Map above. There is currently a KwaZulu-Natal Municipal Airports Development Strategy as an initiative by the Department of Economic Development and Tourism. A recent establishment is that the Ladysmith Landing Strip has been bought by a group of developers. Details for the Ladysmith Airports project are provided below as directly taken from the Draft Status Quo Report, KZN Municipal Airports Project, and KZN DEDT undertaken by the School of Development Studies (UKZN) on behalf of DEDT. This project as mentioned in the extract below can have immense tourism potential. The potential of these five landing strips needs to be further investigated with its role in tourism. Since helicopter rides are famous in uThukela, some of these landing strips are used for that purpose.

Ladysmith Airport

Background:

Ladysmith municipal airport is located in the Emnambithi-Ladysmith Local Municipality. The main corridors within the vicinity of this aerodrome are the N3 national highway, the R103 and N11 to Newcastle and Johannesburg. The aerodrome was sold to a group of developers five years ago on conditionality that the function of the aerodrome enhances development of the region. The land is in the process of being transferred via sectional titles to the investors to commence development of the area. The CAA classification is category 1 which means that the length of aeroplanes landing at this airport must not exceed 9 meters and width of the fuselage is 2 metres. The capacity of 350L of water and foam should be stationed onsite, however, there is no fire equipment or engine on site. The municipal fire department is located less than 5 kilometres from the aerodrome.

Flight Activity: 48

While there is no flight statistics available, it is estimated that the daily average private flight is about 2, 3 commercial arrivals – for business groups in the area, emergency (EMS) daily and 15 flights per week by the flight school. Hence, the main flight activities comprise of some commercial/chartered flights, privateers, a flight school and emergency as well as drug enforcement operations at the Lesotho border.

Infrastructure specification:

The runway is asphalt and 1200 meters in length with an elevation of 800 metres. There are two taxiways. The coordinates are S28 degrees 57.000' and E 029degrees45.000'. There are zero fuel bays and 7 hangars.

Challenges:

A key challenge is the current transfer of the sectional land titles to the developers who are currently executing a series of studies related to the urban development of the area. Furthermore, developers are in the process of redesigning the plans due to CAA review for the undertaking environmental assessment studies given the wetlands and vegetation spots.

Outlook:

With the sale of the airport, this future development plan focuses on urbanising the area to incorporate the airport, five star lodges, a hospital, residential developments and office parks situated within a 5-kilometre radius. The prospect of increased flight activity for the Ladysmith airport is promising as the Integrated Development Plan 2007/2008 highlights, a Tourism Strategy has been developed and a number of key projects such as the development of the present aerodrome into an Airport, Music Hub and branding of the Municipality to promote tourism and business activities.

- Rail

The existing rail network through uThukela is a strong aspect on terms of tourism hard infrastructure. The electric rail network traverses a substantial amount of uThukela and there is potential for rail tourism. Tourism KwaZulu-Natal (TKZN), in conjunction with the Development Bank of Southern Africa (DBSA), identified the development of rail tourism as a potential market niche for growing the provincial tourism economy in the 2005, KZN Rail Tourism Feasibility study. A strategy was then formulated suggesting uThukela be a part of the then proposed KZN Rail Tourism Association. The opportunity for rail tourism in uThukela is ripe and should be considered through further investigation. Local municipalities have also identified the potential of this such as Emnambithi and Imbabazane LMs. (Please refer to the Linkages Map above for rail network.)

- Signage

Signage is one of the major constraints regarding tourism in uThukela. Signage is of utmost importance in directing a tourist around. Over 60% of respondents view signage as a major issue. Signage refers to provision of new signage and maintenance of existing signage. The general impression from stakeholders is that signage in uThukela is poor. This is demonstrated by the signage to the Battlefields destinations. The N3 does not have signage for the Battlefields. The state of signage varies with some areas having very good signage such as central Drakensberg and others poor signage. Only Okhahlmaba has a sign board with a map of the tourist attractions on entrance into the municipality. This is a good example of effective types of signage and needs to be implemented throughout the district. It is generally difficult to find ones way within a local municipality if there is no signage along main roads within the district. This hampers tourism development as visitors are discouraged should it be extremely difficult to navigate through the area.

Suggestions for improvements to signage are as follows:

N3 toll road needs Signage

Signage in R616

Signage of attractions in R600

On the N3 to what the R73, R616 & R600 has to offer

Signage to Battlefields and war graves

Signage for small operators such as crafters

Heritage Route Signage needs assurance

Signage for the Drakensberg Experience Route

Signage at the entrances of the town

Future incorporation of signage for the Maloti-Drakensberg Route

- Information and Communication technology

ICT with regard to tourism development in uThukela is relatively poor in tourism offices and museums. The importance of information and communication technology lies in that, it connects the tourist to the global network. The internet is an important source of finding information and marketing and advertising and is increasingly being used. Access to internet and computers within tourism information offices is imperative for increased communication and efficiency. During stakeholder consultation, it was found that certain tourism offices either had outdated computers and no access to electronic email and information had to be faxed. Data collected in museums and information centres are mainly recorded on paper and not electronically. This makes the task of using the information in reports etc. quite tedious. It should also be noted that the issue around 3G networks and internet friendly infrastructure for purposes of businesses and conferencing.

- **Tourism Information Centres**

The table below is indicative of the tourism structures and staff in place throughout UThukela District in term of the local municipalities. The table below also shows the local municipalities which have tourism information offices and those which do not. Indaka and Imbabazane do not; however, Imbabazane has applied for funding from the National Lottery for an information office. Other information offices that exist, is in Central Drakensberg, which is run by the Bushman's River Association. The existing information centres need to be upgraded to allow for a tourist feel. Information centres should have computers for visitors to use (internet café), a welcoming and exciting entrance which encourages a tourist to come in and ask questions.

Tourism offices in uThukela have almost no record of enquiries which will help with understanding demand in the area. Tourism offices should not be seen as a place to only pick up brochures or ask a question, it should entice the visitor and prompt interest in the area, so that the visitor not only comes back but passes the message on to other potential tourists. The tourist experience needs to be made unforgettable. A tourist often enters a tourist information office for means of navigation and to gain proper knowledge and feedback of the tourism related activities and products. Tourism offices and museums can create this feel. A tourism office should be a place where tourism admin is carried out with a constantly updated record of what exists and how to get there. Tourism offices need to be fully equipped with trained staff, reliable ICT and other facilities to aid a tourist. Navigation should be provided by means other than a map on a brochure, tourist information centres should also cater for local economic development through promoting local skills. Tourism officers need to be well aware of the tourism related activities in and around the areas.

Municipality	Tourism officer/s	Tourism Information Office
UThukela DM	-	-
UMtsheni LM	Yes – Estcourt	Yes
Okhahlamba LM	Yes – Bergville and Winterton	Yes
Imbabazane LM	Yes – based at the municipality	No (Applied for funding for a museum and information office)
Emnambithi LM	Yes	Yes– Ladysmith, Van Reenen, and at Colenso
Indaka LM	no	No

2.3.4.2 Soft Infrastructure and Tour Operators

Tourist soft infrastructure defined here refers to the handling of a tourist once they have entered the Municipality, and also relies heavily on human resources. This refers to the general hospitality of the host communities, and reflects the mind-sets of locals toward tourists. Practically this addresses service levels toward tourists at key spots such as filling stations and restaurants, the safety of tourists (often tourists are perceived as easy crime targets), and general helpfulness and friendliness levels toward foreigners and non-locals in an area. Soft infrastructure largely refers to Human resource development, Skills training and Tourism awareness aspect of infrastructure provision in uThukela tourism sector. The provision of human resources to the tourism industry is a critical success factor of the sector. 'Skills development and training relates not only to the persons working within the tourism industry themselves, such as tour guides, receptionists at hotels etc., but also refers to the skills and tourism awareness of the planning officials, community members wishing to enter the tourism trade etc.³⁶.

³⁶ Urban-Econ: Jozini Tourism Strategy 2010

As such, tourism soft infrastructure in uThukela varied per local municipality. There are no local tourism training educational establishments. UThukela carries out mentorship of interns for short periods of time, however, these interns leave after a short while. The flow of interns also depends on the deployment programme head by DEDT. While tourism awareness is high amongst private sector individuals currently involved in the tourism trade, this is not the case for surrounding communities. Certain municipalities such as Imbabazane, uMtshezi and Emnambithi acknowledge the need for local tourism awareness among the local communities and scholars.

Training of local people involved in tourism is taking place at varied levels in the different municipalities. There is a heritage committee involved with training of locals interested in arts and craft, entertainment and performing, involving youth. UThukela District also provides training etc for crafters as mentioned above, by assisting crafters with advice and skills development, marketing and to link with organisations for mentoring. UMTshezi has an awareness program for scholars and there is an Ambassadors Programme for in-service training which allows uMtshezi to take on interns. There is a Proud Schools programme funded by the N3TC dealing with tourism awareness. There is an initiative in Van Reenen which deals with creating awareness among children and training them in birding and avi-tourism in an initiative called 'Natures Heros'. Tourism Research and Development in uThukela is poor and needs to be developed. It was stressed that capacity needs to be built among the tourism officers at information centres. Consequently, for tourism to become a sustainable and successful sector, training facilities such as hospitality schools should be established in the municipality.

Currently there is a programme to train interested matriculants and graduates in the tourism industry called the Tourism World Academy, as a National initiative by Department of Tourism which offers the youth a 12 month contract and employs 50 people per local municipality.

A potential key capacitation initiative which could be taken on includes the training of local tour guides/operators. Through the surveys and further consultation a need was established to further train and capacitate the local tourism information officers (who are interns) especially at Bergville and Winterton information offices. The Hlathikulu wetland is involved with tourism education. There is an educational awareness programme, which includes assisting the local people to create jobs and promoting local tourism guides. There are 15 known tour guides as listed below. However, there are various other tour operators who are not formally listed, for various reasons, such as they do not belong to C.T.Os or any organisation. They are referred to tourists by tourism information officers. There is a need for local tour guides to be trained and marketed as there is evidence that the local people have the knowledge but are not formal tour guides.

Tour Guides			
Alastair Heron	036 488 1404	084 512 4466	spionkop@futurenet.co.za
Chris van Schalkwyk	036-448 1128	082 464 2543	webmaster@easby.co.za
Danie du Preez	036 631 1131	082 493 5465	danie@mpmlaw.co.za
Elizabeth (Liz) Spiret	036-637 7702	072 262 9669	lizs@telkomsa.net
George Mitchell-Innes	036-421 1860	082 734 3118	mitchellinnes@mweb.co.za
Piet van Rooyen	036-631 2083	082 887 5297	
Raymond Heron	036-488 1404	082 573 0225	spionkop@futurenet.co.za
Ron Gold	033 263 1908	083 556 4068	rgrongold@gmail.com
Shane Spargo		082 800 0620	spargo@futurenet.co.za
Simon Blackburn	036 448 1171	082 379 1864	reservations@threetreehill.co.za
Simon Haw	033 343 3847	082 824 8326	simonhaw@telkomsa.net
Vincent Horn	036 631 0740	083 781 0740	hornv@telkomsa.net
Ken Gillings	031-702 4828	083 654 5880	ken.gillings@mweb.co.za
Ihawu Tour Guides	087-985 1580	072 930 1427	vanreenentourism@megawifi.co.za

Sandile Msimango/ Khumalo (Township/ Cultural Tours)	082 714 878		
Canopy tours			
Aventure centre			
Drakensberg Tugela/Vaal Water Scheme			

2.4 Transformation of the Tourism Industry

A formalized transformation in tourism strategy does not exist. There is also no coordinated effort to transform tourism other than the training of interns. There is a lack of research and development and tourism staff need to be capacitated. Entrepreneur development is important to sustain tourism activities and produce more black entrepreneurs. Majority of tourism products are currently white owned and through workshops and stakeholder consultation it was stressed that there is a need for more black owned enterprises and more participation and contribution by communities through community based tourism. There is insufficient information to provide a detailed analysis of BEE Status. Communities lack awareness on tourism and therefore find it difficult to pursue tourism initiatives or have little vested interest. There is also a language barrier.

However, there have been community based projects as defined throughout the report such as cultural center etc. promoting communities and trying to get rural under privileged communities involved in tourism trade and activities as well as a degree of awareness. Efforts do exist as seen throughout the report, however, these programmes are not coordinated and do not reach all people. Given that there has been strides taken, transformation is slowly underway in uThukela and needs much more attention and investigation. Below is a summary explaining the Tourism BEE Charter which the uThukela District Strategy aligns to. Tourism KZN is also an important body with regard to transformation, given that it is one of the mandates is to champion transformation in KZN. In this regard, the focus area of transformation includes provision of advisory services, facilitation of skills development, monitor and facilitate BBBEE Scorecard compliance, facilitate access to funding for tourism, business Centre for SMMEs in KZN and community focus. The uThukela strategy therefore needs to prioritize transformation the tourism sector.

Through government funds initiatives there are Black owned and this has been prioritized and uThukela should therefore take advantage of this to grow its BEE status through the tourism industry.

TOURISM BEE CHARTER (with reference to Urban-Econ: South Coast Tourism Strategy)

The tourism industry in South Africa is largely untransformed with the majority of tourism products mostly owned by whites. While some of the larger tourism enterprises have begun transforming, there is still a long way to go, with only an estimated 6% of listed tourism entities having BEE ownership. Transformation of the industry has also been slow in terms of control and management profiles. With the signing in of the Broad Based Black Economic Empowerment Act, the definition of BEE now includes the ownership, management, employment equity, skills development, affirmative procurement, and enterprise and social development. Through the act, sectors are encouraged to set their own programmes and targets to achieve the overall targets of the act.

A study commissioned by DEAT found that transformation of the tourism industry will:

- Increase the competitiveness of the industry
- Will ensure that the tourist products are more authentic
- Better cater to international tourist demands.

It further found that the low barrier levels for entry into the industry would facilitate the entry of BEE tourism companies. The charter sets the standard of level of inclusion of black people in tourism through the scorecard.

Key elements of this are as follows:

- Voluntary agreements within the industry to achieve empowerment targets
- Provides measurement tools to assist companies to comply with the targets
- Recommendations on how to achieve ratings on the bee scorecard
- Incentives established to help reach these targets such as development funding and that use of BEE compliant supplies will boost private sector companies' empowerment ratings.

In order to prevent the charter from stifling the SMME market, companies with turnover of less than R5 million per annum do not have to comply with the ownership requirements specified in the charter. Key indicators of the BEE Charter and Scorecard are summarised below:

- The scorecard provides the tool to measure BEE progress. The scorecard measures three core elements of BEE:
- Direct empowerment through ownership and control of enterprises and assets (ownership and strategic representation)
- Human resource development (employment equity and skills development)
- Indirect empowerment through preferential procurements and enterprise development (preferential procurement, enterprise development and social development).

2.5 Marketing

Adequate marketing is one of the main success factors of tourism. It is very important to undertake an analysis of the current marketing practices in uThukela DM. This section deals with marketing within the district. Alignment with the KZN Tourism Master Plan is also imperative for this strategy which will be dealt with and guidelines provided under the Tourism Sector Strategy Formulation section of this report.

2.5.1 Overview of KZN Tourism Master Plan Marketing Strategy

Detailed alignment to the KZN Tourism Master Plan is provided in the strategic framework below under the Marketing Cluster.

2.5.2 Current Marketing Practices in uThukela District Municipality

Marketing is currently done ad hoc by the private sector whom market on their own initiatives through a host of medians such as through websites and brochures as well as trade shows (Indaba and Getaway). The online survey results for the responsible party for marketing are illustrated by the graph below. The graph shows that almost 100 % of the respondents market on their own initiative. Marketing is an activity to be undertaken by all stakeholders in a coordinated manner. The

Okhahlamba Drakensberg C.T.O for example, has a website for marketing. The graph below indicates that the most common responsible party for marketing the tourist attraction and product is done as an own initiative. This poses a great challenge as the area needs to have collective marketing base in order to adequately reach its audiences.

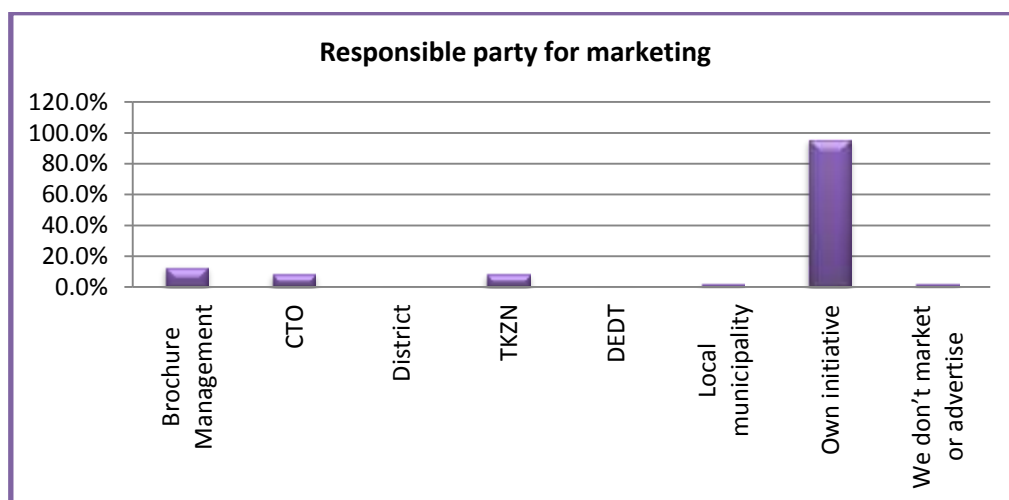


Figure 16 – Persons responsible for marketing initiatives in uThukela DM (Source: Urban-Econ Online Survey 2011)

Interviews have revealed that many places in uThukela are visited by passersby who do not know about the area. This is due to the lack of marketing. There is high tourism potential in UThukela and the local municipalities as seen from the market supply analysis. There seems to be consensus on the issue of marketing through the district. A hindering factor for marketing however, is a detailed database of existing products to be marketed. This was experienced with difficulty of retrieving comprehensive information as needed by the current strategy.

In essence, certain attractions gain more exposure to others. This needs to change in order to realise the potential and attract visitors to other attractions as well. UThukela has an abundance of tourist attractions and destinations; however, as seen from the consultation process, it is inadequately marketed. Marketing can also attract further investment into the area and is very important to sustain the current activities which lie in the district. The overseas market needs to be tapped into. Distribution is haphazard and ineffective. Brochures are sent to tourism offices and wait there to be picked up by potential tourists.

The issue of lack of marketing has been highlighted through the online survey which indicates that over 50% of people see marketing as a key constraint. The most effective forms of marketing as indicated by the results of the online survey are medians such as the internet and word of mouth. Over 80% viewed the internet as being the most effective form of marketing and over 70% viewed word of mouth as the most effective form of marketing. This was followed by brochures. TKZN Visitor book statistics indicate that the most effective forms of marketing for the Drakensberg and Battlefields region is firstly word-of-mouth, followed by Brochures then the internet. It is clear to see that these forms of marketing are the most effective. The Drakensberg is a Word Heritage Site, which makes it likely that the site is internationally well known. Word-of-mouth is therefore of great importance and lots of people like to share their holiday experiences with others.

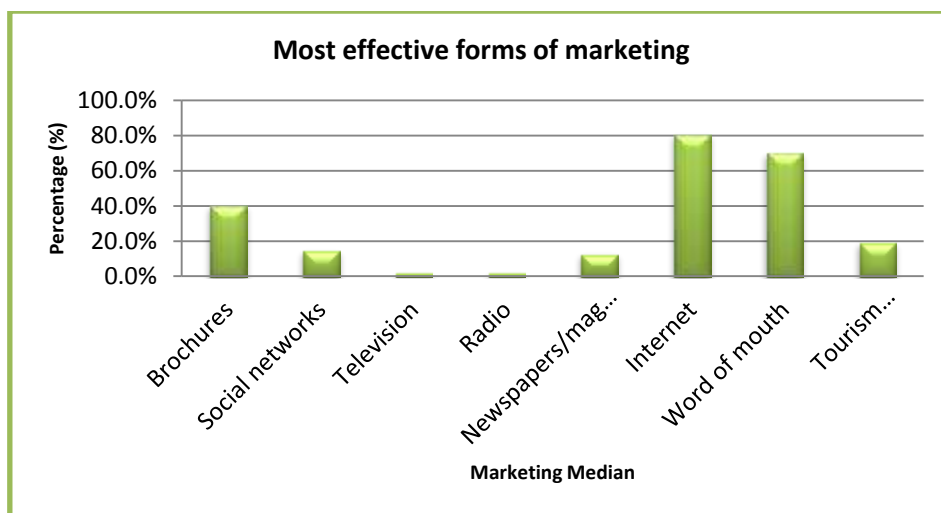


Figure 17 – Most effective forms of marketing (Source: Urban-Econ Online Survey 2011)

- **Types of Marketing**

Publications and Brochures

The area is currently not marketed well. Brochures are sent to tourism offices or just not distributed. Ways of marketing at the moment are through various websites, Indaba (at the TKZN stand), Getaway, Brochure management, Open Africa and N3 Gateway. Brochures are distributed through the tourism offices and various other places but this is only for certain attractions. UThukela has acknowledged that the current brochure is outdated and needs to be updated. Marketing is seen to be the most hindering factor with regard to growing the tourism industry in uThukela. Brochures do exist for some areas, uMtshezi for example, prints information as and when tourists need it. There are brochures for Drakensburg and battlefields attractions. UThukela District does have a brochure which is due for updating. Producing a brochure is just one aspect of marketing. These brochures are not adequately distributed to main destinations which will expose the area.

Internet:

With regard to the internet there are a host of websites with the same information on only certain places. There is no common website for the district to allow people to have a dedicated site to access which will link to all the available attractions and information on each. For example, the World Heritage site belongs to the Ezemvelo KZN Wildlife, together with the resort administered by Ezemvelo KZN Wildlife, which is responsible for the marketing of that, and is available on the TKZN and various other websites, the battlefields has their own websites as well.

Trade/Exhibition Shows:

Advertising is done through Trade shows as well such as Indaba, however, only on the TKZN stand. Potential exists for overseas travel shows to be tapped into as well. At the moment there is no dedicated stand at the Indaba for uThukela. UThukela is on the waiting list for the advertisement at this year's Indaba however they have space at the TKZN pavilion. The local crafters attend exhibitions which exposes them to wider markets which could expose uThukela as well. Marketing takes places at international and national exhibitions as well; however, this may be for specific events. This area for marketing should be looked into as it provides great exposure.

Other:

There is also potential to begin to look at other options of marketing such as through social networks such as Facebook, access to information through cellular phones. Consultation was carried out with a company, Roger Layton Associates, interested in using the mobile telephone and ICT for improved tourism information. The methodology used is by employing local people to do field surveys on the tourism products and information, in order to have an up-to-date, accurate database. This pilot project called xTownx is currently being undertaken in Okhahlamba LM. Another project being undertaken by Roger Layton and Associates is the 'Virtual Museum' idea which allows tourists to embark on a virtual tour of a museum before visiting it. This idea was communicated through a conference held at the Seige Museum, details are vague. Trade journals and magazines are also a good way of marketing. Travel magazines are an important tool for marketing; however, marketing should be expanded to other magazines, such as the ones that people buy or in newspapers within major metros and municipalities.

Responsible parties for marketing include the designated C.T.Os, the local and district municipalities as well as the provincial bodies such as TKZN. The N3 Gateway and Okhahlamba CTOs as well as Open Africa are proactive with regard to marketing. Marketing should be done with the purpose of increasing the visitor numbers to UThukela District; however, it does not stop there. Marketing and advertising needs to be done while within an area as well, through tourism information offices (and proper signage to let tourists know that there is a help centre for tourists. Assistance at petrol stations and restaurants needs to be mainstreamed. Advertising and marketing should be done at local petrol stations, restaurants etc.

UThukela Marketing Strategy:

Initiative was taken by the district by making funding available for a marketing strategy, however, the service provider that was appointed failed to deliver and it was cancelled. Therefore there exists the need for a comprehensive marketing strategy in order to expose tourism products in uThukela via various types of media. With regard to types of media used, there is very little diversity due to lack of resources. Collective marketing for the district is essential as currently, some attractions are more exposed than others, therefore limiting the tourist experience of uThukela and visitor numbers are not as high as they could be.

Current Branding in UThukela District

The current branding for UThukela as a whole is linked to the Drakensberg and Battlefields regions. UThukela is sub branded as the **'Soul of the Zulu Kingdom'** as per TKZN branding. Individual local municipalities have potential branding, such as Emnambithi with 'Beat of Ladysmith' due to the world renowned Ladysmith Black Mambazo. However, there is no initiative taken to market these brands at a district level. The recently released KZN Tourism Master Plan needs to be implemented before any branding and marketing can be mainstreamed at this stage. Even though a sub brand exists, there is no sort of alignment with this district branding that comes through the existing brochures. The existing brand for the district needs to be prioritized and marketed accordingly as there is a need for collaboration of all areas of the district.

The battlefields Route has been branded and falls within uThukela as well as the Maloti-Drakensberg Route and the Drakensberg Experience route. These brands have been marketed accordingly by the C.T.Os and organizations that represent them such as Bushman's River Tourism Association, N3

Gateway and Open Africa. There is also a P9 birding route. There lies potential for various other branding, for example of routes and linkages to surrounding districts such as Amajuba by considering a themed tourism route or corridor along the N11.

The graph below is an indication of the results from the online survey, which shows that lack of marketing features as the most voted major constraint to growing the tourism industry.

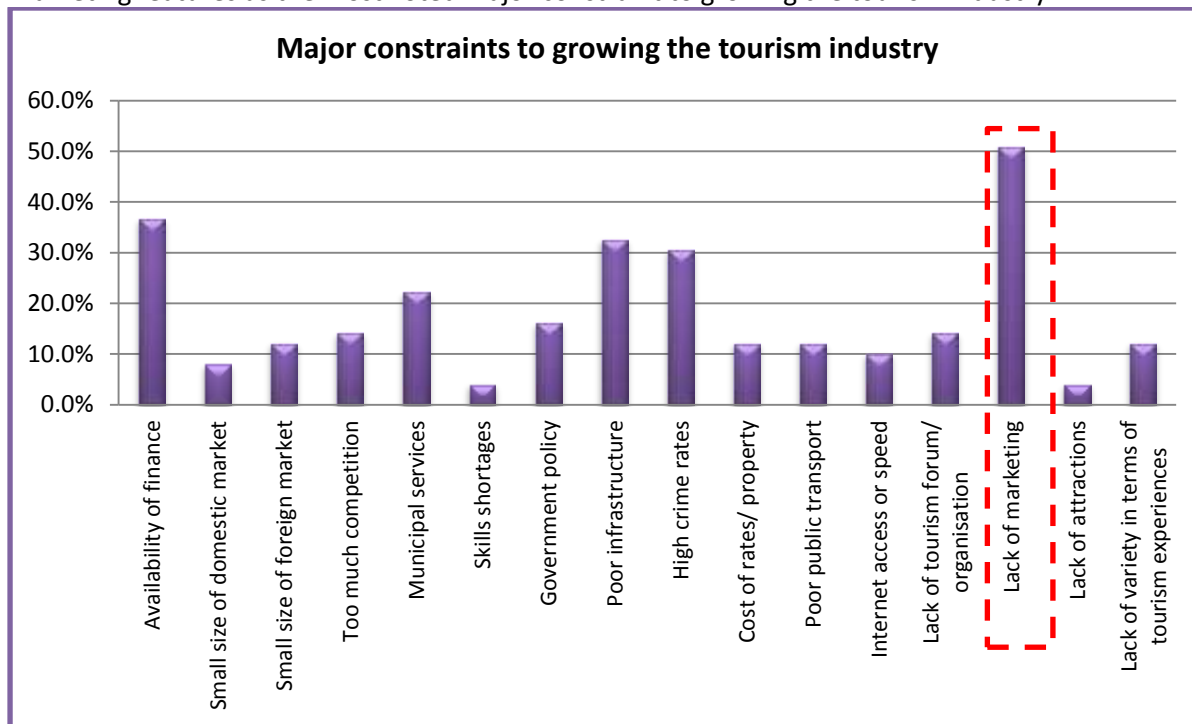


Figure 18 – Major constraints to growing the tourism industry in uThukela (Source: Urban-Econ Online Survey)

2.6 Tourism demand Analysis

This section of the report turns to the visitor demand analysis which is essential in understanding the demand for tourism products within uThukela District by analysing trends of the local, national and provincial tourism market.

Visitor Demand Model for a Destination

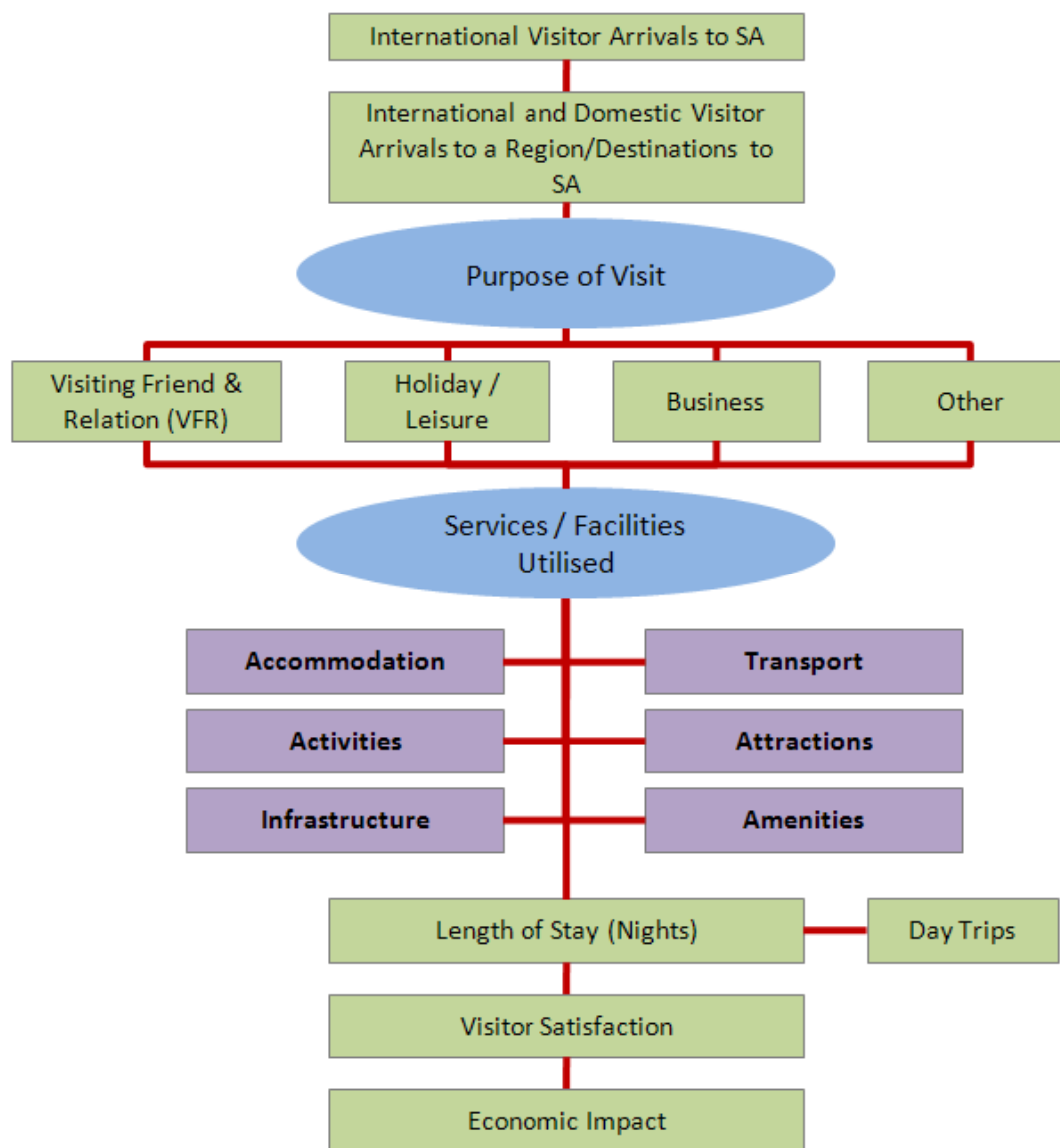


Figure 19 - South African Tourism Planning Toolkit (Source: Department of Environmental Affairs and Tourism)

2.6.1 Global Tourism Market³⁷

'While economic growth going forward faces many challenges – as both governments and the private sector in many developed economies seek to reduce their debts, and as the prices of oil and other commodities rise – the Travel & Tourism industry is still expected to be one of the world's fastest growing sectors. Emerging economies, in particular, are expected to be increasingly important engines of such growth, boosting both international travel³⁸.

Globally, tourism has grown in 2011, despite challenging conditions, with the sector being responsible for 5% of the world's GDP, 6% of total exports and employing one out of every 12 people in advanced and emerging economies which contributes to stimulating growth and job creation. Please refer to the table below for a breakdown of the statistics for the number of employed people in the tourism sector, and contribution to GDP with a comparison of KZN, South Africa and globally. *'International tourist arrivals grew by over 4% in 2011 to 980 million, according to the latest UNWTO World Tourism Barometer. With growth expected to continue in 2012, at a somewhat slower rate, international tourist arrivals are on track to reach the milestone one billion mark later this year³⁹.*

Global Tourism Contribution 2010

	World	Africa	South Africa	KZN
Number Directly Employed	96mn*	7.7mn*	±389 100*	±152 000***
Total Employed	258.6mn*	18mn*	±590 200**	±216 000***
Contribution to GDP %	9%*	±10.2%*	±11.5%*	±8%
Total Direct Contribution to GDP (Foreign + Domestic)	US\$1 758bn*	US\$73bn*	±R93.6bn	±R24bn***
Total Contribution to GDP (Foreign + Domestic)	US\$5 702bn*	US\$162bn*	±R194.5 bn+	±R34bn***

Source: WTTC 2011*, SAT**, TKZN*** 2011, **** Stats SA derived from GDP for KZN Current Prices - domestic and international* Stats SA derived from GDP for KZN Constant Prices, SAT 2010 data not available +.

Figure 20 – Global Tourism Contribution (Source: TKZN Statistics 2011)

International tourist arrivals grew by 4.4% in 2011 to a total 980 million, up from 939 million in 2010, in a year characterized by a stalled global economic recovery, major political changes in the Middle East and North Africa and natural disasters in Japan. By region, Europe (+6%) was the best performer, while by sub region South-America (+10%) topped the ranking. Contrary to previous years, growth was higher in advanced economies (+5.0%) than in emerging ones (+3.8%), due largely to the strong results in Europe, and the setbacks in the Middle East and North Africa. According to the WTO, there is more confidence emerging economies than in the advanced economies.

UNWTO forecasts international tourism to continue growing in 2012 although at a slower rate. Arrivals are expected to increase by 3% to 4%, reaching the historic one billion mark by the end of the year. Emerging economies will regain the lead with stronger growth in Asia and the Pacific and

Implications for UThukela DM

The global tourism market affects tourism in UThukela directly and indirectly. Global trends need to be taken into account in order to monitor demand for tourism. As seen through the demand analysis, a large number of international tourists visit uThukela annually. This market is not only important for the economy of UThukela but for sustaining tourism in UThukela. The spend per international tourist far outweighs the spend of a domestic tourist as seen below. Due to uThukela's favourable position to the international border of Lesotho, international trends are important to be taken into consideration.

³⁷ Please note that all information provided has been sourced from the UNWTO website unless otherwise referenced.

³⁸ World Travel and Tourism Council. 2011. Travel and Tourism Economic Impact: Available: www.wttc.org

³⁹ World Tourism Organisation: <http://www.unwto.org/>

Africa (4% to 6%), followed by the Americas and Europe (2% to 4%). The Middle East (0% to +5%) is forecast to start to recover part of its losses from 2011. Africa maintained international arrivals at 50 million, as the gain of two million by Sub-Saharan destinations (+7%) was offset by the losses in North Africa (-12%).

Travel facilitation by government is being encouraged by the UNWTO as well as the use of information and communications technology in improving tourism related formalities. This is important for uThukela District municipality as poor facilitation can hinder the amount of international tourists entering the country. If less tourists enter South Africa then less tourists make use of the attractions in uThukela and other districts. Tourism economies need to be increased in South Africa as seen through the National Tourism Sector Strategy.

2.6.2 National Tourism Trends

The NTSS aims through the vision and mission to position South Africa as a top international tourist destination also stating that the amount of foreign tourists has increased by more than 3 million in 2009 and that the African continent is the largest source of foreign tourist arrivals with a growth rate of 5.6 %.

As stated in the South Africa Tourism Annual report 2010/2011, tourism in South Africa continued its upward trend with 8.1 million tourist arrivals in 2010, a 15.1% increase on 2009 (more than double the global growth of 6.7%). This relates to the global trends discussed above with demand and travel increasing in 2010 to 2011. Plausible reason for the immense increase in tourism growth was South Africa's successful hosting of the 2010 FIFA World Cup™ in June and July but growth was recorded across all 12 months of the year. Research shows that the World Cup not only boosted tourism numbers in 2010 but significantly elevated awareness of South Africa as a leisure destination across the world. This, coupled with dramatically improved tourism infrastructure, is expected to further drive tourism growth in the short to medium term. It is important to understand the international tourism trends to determine the growth or decline of the international visitor trends⁴⁰.

South African Tourism Annual report states that there was a marginal decrease in domestic tourism from 29.7 mil in 2010 compared to 30.3 mil in 2009 which could possibly be due to availability of finance relating to the cost of airfares and airport taxes as well as the cost of fuel for domestic tourists. However, travel for the primary purpose of holiday increased from 12% to 13.4%. There was an increase of 19.2% in total direct spend from tourist arrivals in 2010. While the domestic market contributes 72% of total tourism volume it only contributes 17% of total spend. With regard to foreign tourists, the purpose of visit was mainly for shopping in 2010, followed by Visiting Friends and Family and holiday, this trend remained from 2009.

Implications for UThukela DM

The demand and trends of the South African tourism market affects tourism in UThukela directly and indirectly. If tourism is not performing well in South Africa as a whole then it will not for UThukela. Tourism is a holistic responsibility which involves all spheres of government who collectively contribute to sustaining the tourism market in the country. UThukela has one of eight World Heritage sites in South Africa and therefore has a huge role to play. UThukela is also favourably positioned at the borders of Lesotho and the Free State, linking it to the favourable tourism opportunities and possible exposure, therefore the South African tourism trends are important to take into consideration.

⁴⁰ South African Tourism Report 2010/2011

2.6.3 Provincial Tourism Trends

2.6.3.1 KZN Foreign Tourist Picture

The KwaZulu-Natal foreign tourists made up 956 550mn visitors of the 8.074mn that visited South Africa in 2010 which has decreased since 2009. The average spend and total market value remains the same since 2009 at ±R 7 215 and R 8.15 bn respectively. The length of stay has however increased by 0.3 nights on average. The main overseas source markets remain the same except that Australia does not make up the top five, and is replaced by Netherlands as compared to 2009. The main purpose of visit to KZN by foreign tourists (Overseas and African Air Departures 2010) has seen a decrease in business from 21% in 2009 to 18% in 2010; holiday remains the largest portion at 56.3 % in 2010 which has increased slightly from 56% in 2009. It is important to note that the purpose of visit to KZN (Land Departures 2010), which is mainly from neighbouring SADC regions has increased for holiday purposes from 30% in 2009 to 56% in 2010, showing that foreign visitors both from SADC regions and overseas are perceiving KZN as a holiday destination. A large amount of foreign visitors (Land Departures 2010) also visit for business purposes. Through stakeholder confrontation it was found that business tourism has potential to grow through conferences etc. in uThukela mainly Emnambithi LM and Okhahlamba and the Drakensberg region. The Drakensberg and Battlefields makes up for 27% (258 269 when calculated using the TKZN figures) and 7% (66 959mn when calculated using the figures provided by TKZN) of the destinations visited in 2010 which has remained the same since 2009. Durban Metro makes up the main destination at 79% in 2010 followed by Elephant Coast at 40 % in 2010 and then Zululand at 30% in 2010. These trends remain the same since 2009.

Kwazulu-Natal – The Foreign Tourist Picture 2010	
Number of Visitors Annually	956 550mn
Average spend per visitor	±R 7215
Total Market Value	R 8.75 bn
Length of stay - average	6.8 nights
Main Overseas source markets	UK, USA, France, Germany, Australia

40% of
foreign

tourists in KZN visited natural attractions in 2010 which has decreased from 62% in 2009, 22 % visited cultural, historical and heritage attractions in 2010 which has decreased by 14% since 2009 and 27% visited wildlife attractions in 2010 which has decreased by 21% from 2009. Adventure activities also decrease since 2009 but by only 1%. These activities mentioned are some that uThukela offers. The overall

decrease in foreign visitors as mentioned above relates to these decreases in partaking in the mentioned activities.

2.6.3.2 KZN Domestic Tourism Picture

The graph below shows that the Battlefields was the least visited in KZN in 2010, which has increased from 42 000 in 2009 to 158 000 in 2010, although still makes up the least popular destination visited in KZN. The Drakensberg makes up the 5th visited destination in KZN by domestic

Implications for UThukela DM

UThukela DM falls under the jurisdiction of KwaZulu-Natal and therefore should abide and aligns to all provincial mandates. It has one of two World Heritage sites in KZN and falls within two tourism regions as defined by Tourism KwaZulu-Natal, namely the Battlefields and Drakensberg. KZN tourism demand trends and characteristics are imperative to understand when planning for a district municipality within KZN as it provides the demand market for both foreign and domestic tourists visiting KZN and the regions of Battlefields and Drakensberg within which uThukela has direct relevance. The demand within these regions and KZN helps for future planning and to determine the current trends and find reasons for the better/worse performance. This coupled with the supply analysis helps to understand the situation better in uThukela DM.

tourists at 478 000 domestic tourists in 2010 increasing from 207 000 in 2009. The overall number of domestic visitors to KZN has decreased by ± 0.5 mn trips since 2009. The average spend per trip has decreased by R 10 in 2010 and the total spend also sees a decrease by 0.74 in 2010. The largest source markets remain to be KwaZulu-Natal and Gauteng. The average length of stay has decreased by 0.3 nights. The domestic market makes up majority of the people visiting the Battlefields and Drakensberg as compared to the foreign tourists which make up almost half of the domestic tourists visiting this destination. It can therefore be seen that the domestic market is quite strong and is growing, however, the average spend and total market value for foreign tourists to KZN far outweighs the contribution by the domestic market which is reiterated above by the trends shown through the national statistics for South Africa. UThukela should see this as an opportunity, to not only retain the expansion of the domestic market but try to maintain and attract foreign market.

Table 7- KwaZulu-Natal Domestic Tourist Picture (Source: TKZN Statistics Brochure 2011)

KwaZulu-Natal – the Domestic tourist Picture 2010	
Number of Visitors Annually	± 8.3 mn trips
Average trips to Drakensberg	2.4
Average trips to Battlefields	1.5
Average spend per visitor	$\pm R 710$
Total Market Value	R 5.6 bn
Length of stay - average	4.6 nights
Main Overseas source market	KwaZulu-Natal, Gauteng

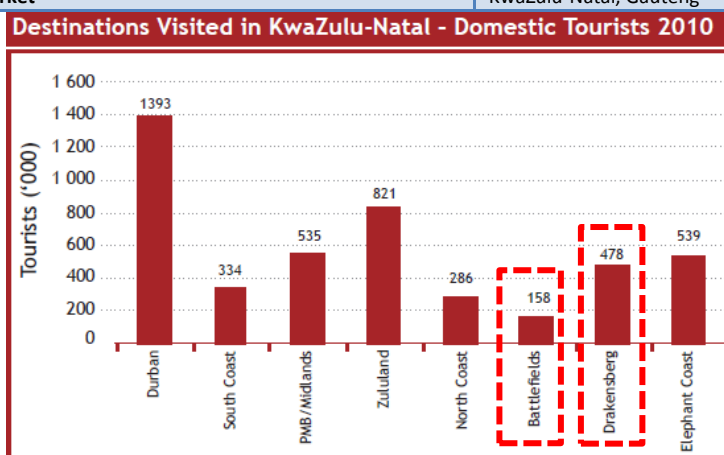


Figure 21 – Amount of Domestic Tourists to the Battlefields and Drakensberg regions (Source: TKZN Statistics Brochure 2011)

Purpose of Visit

The major purpose of visit to KwaZulu-Natal by domestic tourists was for visiting friends and family in 2010 rising from 50.7 % in 2009 to 52.1% in 2010. This is followed by holiday/ at 35.8% decreasing by 0.6 % since 2009. Business travel among domestic tourists has increased by 1.6 % in 2010. The activities undertaken by domestic tourists visiting KZN in 2010 are shown in the figure below. The activities marked with a star symbol ★ are the activities offered by uThukela and the attractions within the district. These activities provide an indication of the demand for the activities by domestic tourists, other than beach activities(which do not fall in uThukela), visiting a nature, wildlife or game reserve makes up the second largest number of activities visited by domestic tourists in 2010 which has increased since 2009. UThukela is rich in nature activities and since demand is high, this could be an area of opportunity.

Visits to museums, art galleries/ historical buildings fall under the third highest visited places increasing from 15.5% in 2009 to 22.6 % in 2010. There are many Historical buildings and museums in uThukela. Only 11 % visit an arts and craft outlet, decreasing by 2 % since 2009. The demand for

arts and craft is decreasing at a provincial scale, however, craft and art can be seen as an area of opportunity as uThukela has a rich resource base with skilled arts and craft specialists who as seen through the supply analysis need to be given attention to, in order to foster SMME development. Visits to African township or cultural villages on tour has remained the same since 2009, however, this sector is deemed to be in demand for uThukela as seen through stakeholder consultation as people want varying experiences and want to see what is taking place now, with the cultures and faction fighting among political parties.

Hiking and mountain climbing activities have increased since 2009 suggesting an increase in demand of related activities which is offered by uThukela. Seeing bushman paintings, bird watching has also increased by domestic tourists. Of all the activities battlefields tours has increased by 0.2 % since 2009 by domestic visitors however, still making a very small contribution to the activities undertaken at only 2.9 %. Through a survey carried out for Tourism KZN by a tour guide, it was established that 76% of the people whom are taken on Battlefield Tours are South Africans. Seven years ago, it was 95% British. This indicates that the South African domestic market has huge potential as citizens are beginning to explore their own country instead of holidaying overseas. This set of statistics compares with the statistics obtained from TKZN as it depicts that the domestic market is larger than the foreign market. 5000 people are directly employed in the greater Battlefields Region as a result of battlefield tourism.

Activities Undertaken in KwaZulu-Natal - Domestic Visitors 2010

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

2.6.3.3 General Tourist Picture for KZN (Foreign and Domestic Comparisons)

Statistics obtained from Tourism KwaZulu-Natal's Visitor Book Project Report. By means of the Visitor Books, Tourism KwaZulu-Natal (TKZN) collects tourism information on media influence, purpose of visit, country of residence and more, of those people who visited participating establishments and filled in visitor books.

The information from these books is returned by their users on a regular basis and is captured in Tourism KwaZulu-Natal's Visitor Book database. Reports on this data are produced and provided to the tourism amenities which work together on this project with Tourism KwaZulu-Natal. This report contains several sections: first is an introduction to the report, second an analysis of the tourism market of the whole of South Africa, which is followed by an analysis of the tourist picture in KwaZulu-Natal. Third, there is a description of the Visitor Books, fourth, data from who filled in the standard visitor book are analyzed and fifth, data from all respondents who filled in the hostel book are analyzed. The different regions within KwaZulu-Natal are analyzed and also the seasonality within these regions. Lastly, there are some conclusions and recommendations drawn from these findings which prove useful in term of future planning for all participants.

What is interesting to note is that the visitor book results mirror the results of South Africa's tourism statistics extremely closely. The visitor book data indicates that most foreign visitors to KwaZulu-Natal are from the UK, USA, Germany, the Netherlands, Australia and France. Domestic markets tend to remain as Gauteng or KwaZulu-Natal. The low season troughs in June and peaks during traditional and school holidays, which is also the case in the other regions of KwaZulu-Natal. This is a further indication that the majority of visitors to establishments with visitor books are South Africans, as well as an indication as to which markets need to be targeted in order to lessen the effects of seasonality.

Battlefields

The visitor book⁴¹ report deduced that the main reasons for visits to the battlefield region is for holidays followed by VFR, with 53% being on holiday in 2010-2011 period decreasing by 30% from the previous years, and 47% for VFR in 2010-2011 period showing a considerable increase by over 30%. 'The change of holiday and VFR was likely due to the global economic crisis causing people to have less disposable income'. Business travel shows an insignificant percentage and has decreased from 8.1% in 1998-2001 to 0.98% in 2010-2011. This insignificant number may not be a true reflection of the business travellers as the intention for visit is business and people may not go to destinations with visitors' book such as tourism offices and museums. Another reason why it is felt that this is not a true reflection is due to the general trend as determined through stakeholder consultation is that business tourism especially in Amajuba and Ladysmith has been growing and is becoming more and more dominant. Compared to the provincial trend for purpose of visit, which has more people visiting friends and family than on holiday, the Battlefields deviates to be a more holiday related experience.

Indicated by TKZN Visitor Book Report, the South African summer months are popular for foreign tourists to visit the Battlefields, due to the perfect weather in the province while the public holidays are the most popular periods for domestic visitors to visit the Battlefields, as they have several days off in which to travel. As can be concluded from the information provided by the Visitor Book Report, the Battlefields area had no real benefit from the 2010 World Cup.

Approximately 45% were foreign and the majority domestic. This deduction reflects the information gathered from the local tourism offices and the museums, with domestic (mainly KZN and Gauteng) tourists being more dominant, however, there is a large amount of foreign (majority from UK probably because of the link to British history) tourists indicating that there is a large market for foreign tourists to the battlefields. This might be explained by the fact that the Europeans, especially the British, have a historical connection with South Africa, and thus interested in this historically rich region.

⁴¹ Tourism KwaZulu-Natal (TKZN). 2011. KwaZulu-Natal Visitor Project Report

Drakensberg

The Drakensberg is mainly a holiday and recreation destination and the statistics from the visitor book respondents according to TKZN indicate that 72% in 2010/2011 period of visitors visited for holiday purposes which have decreased by 12% since 1998/2001 period. The graph below shows that majority of the respondents visited Drakensberg for holiday purposes and VFR. The UK made up the largest number of respondents followed by Germany and Netherlands visiting the Drakensberg. The domestic market for the Drakensberg far out ways the foreign market showing a demand in the domestic sector of visitors.

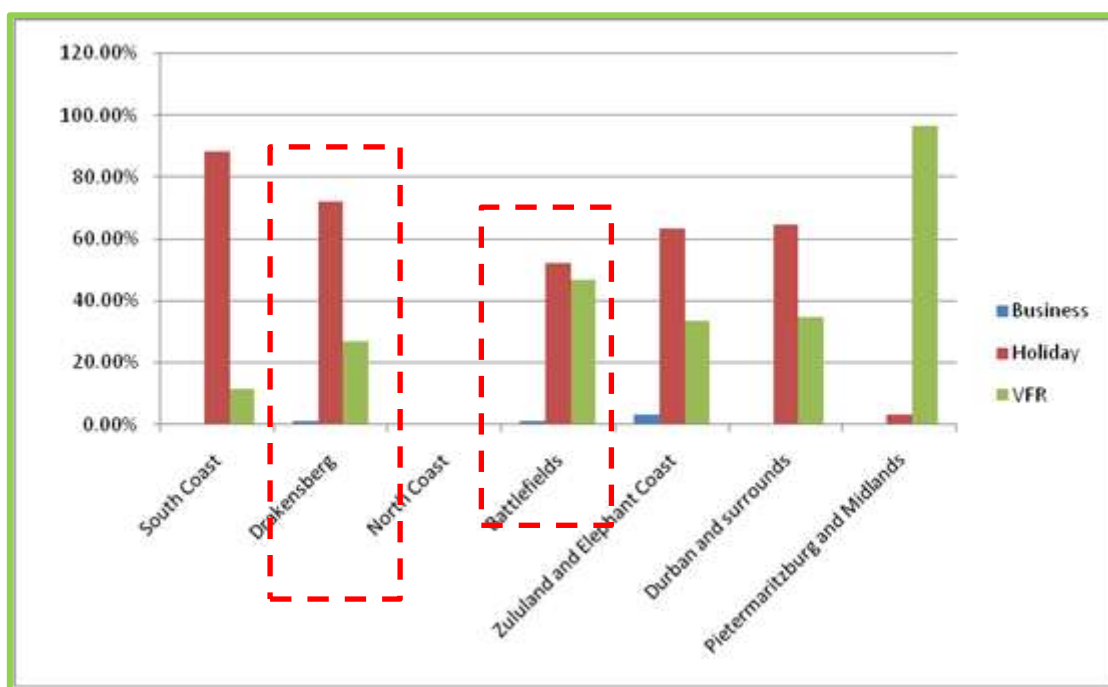


Figure 22 – Purpose of Visit January 2010 to June 2011 (Source: TKZN)

2.6.4 Tourism in uThukela District

Tourism forms one of the major economic sectors in uThukela DM. Most important to note is that The Battlefields and Drakensberg which has been branded by KwaZulu-Natal Tourism (TKZN) falls directly within uThukela DM. For this reason the Battlefields and Drakensberg will be discussed accordingly as major tourism draw cards to the district.

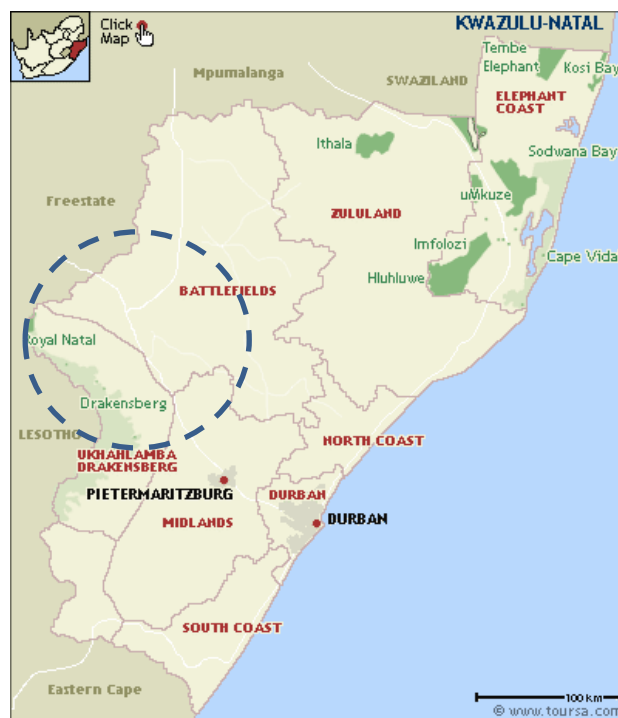
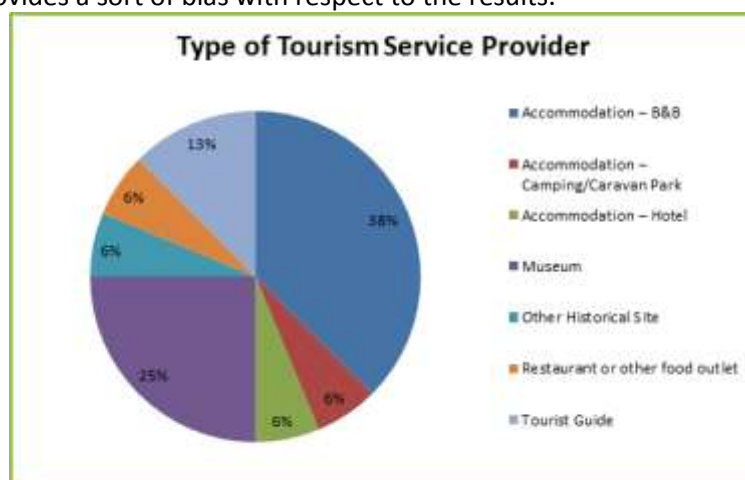


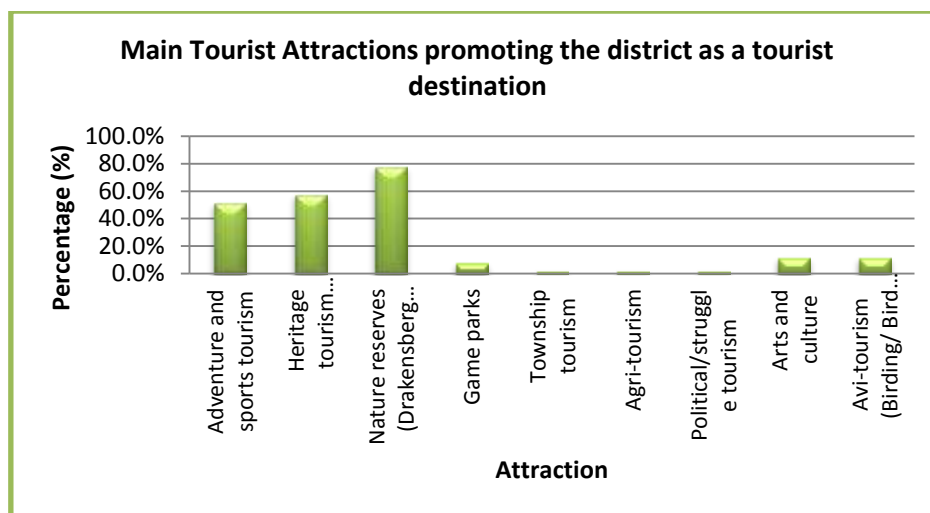
Figure 23 – UThukela depicted according to TKZN Tourism Regions (Source: Google Images)

The methodology used for the tourism market demand analysis is as follows:

- A survey was carried out with a sample size of 30% of the available database of service providers. It is important to note the profile of the respondents shown in the figures below as this provides a sort of bias with respect to the results.

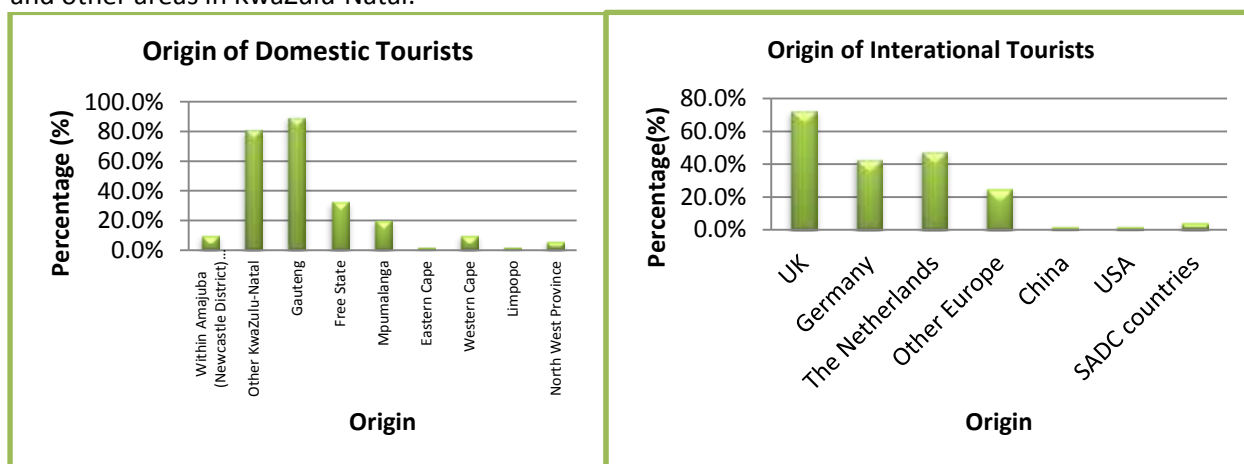


- Tourism KwaZulu-Natal 2011 statistics: This provided an important source of information regarding demand in South Africa, KwaZulu-Natal, and the Drakensberg and Battlefields sectors. Estimates have been derived accordingly.
- Other sources of information came from statistics provided by Ezemvelo KZN Wildlife, the Battlefields Association, Amafa, museum statistics obtained from Department of Arts and Culture as well as the museums themselves, local municipality tourism offices, and other stakeholders such as events co-ordinators and tour guides.
- According to the survey, the main tourist destinations in uThukela are shown in the graph below to be Adventure and sports tourism, Heritage tourism and nature tourism. Other types of tourism include game parks and arts and culture as well as avi-tourism.



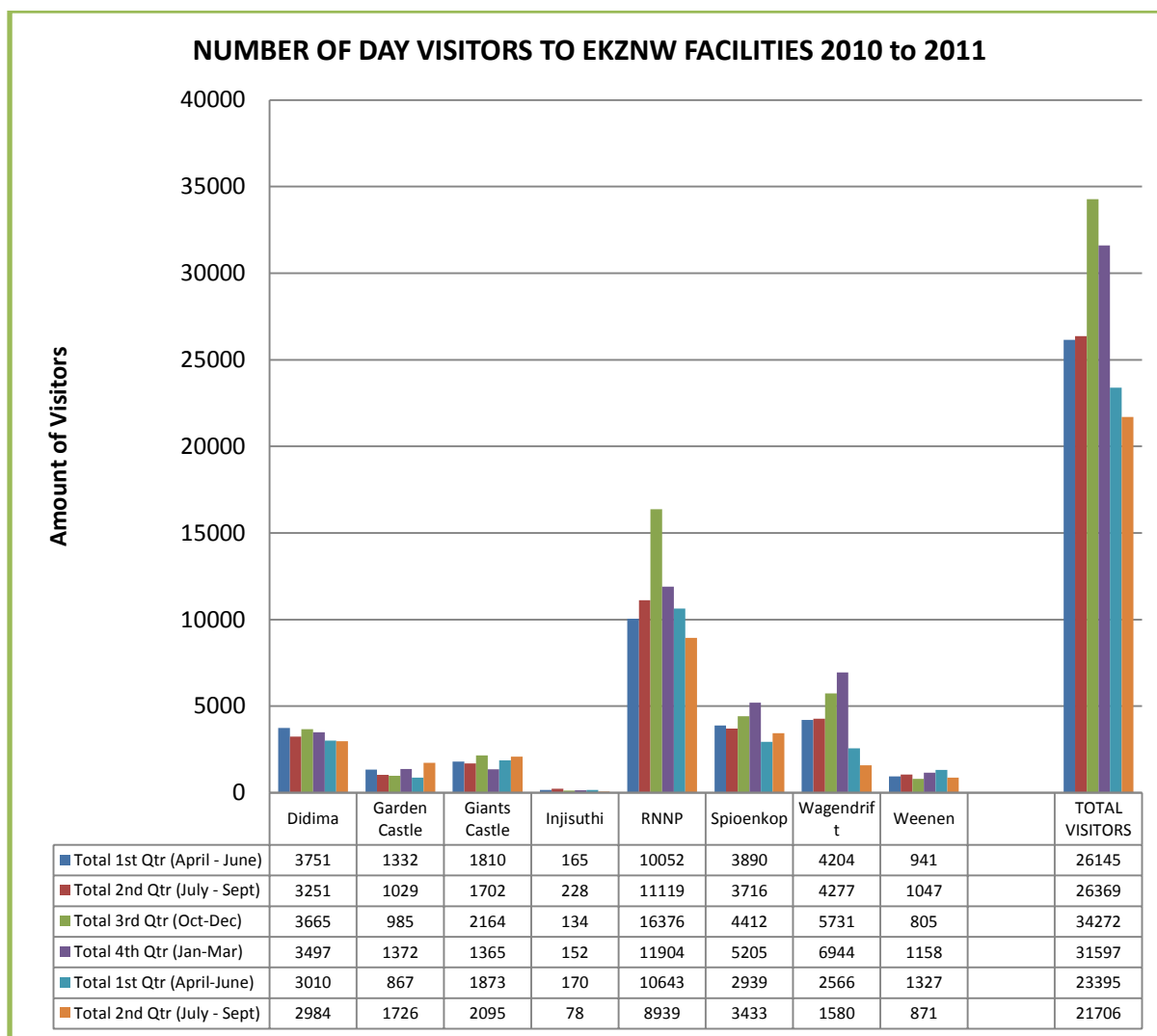
• Origin of Tourists

Results from the survey suggest reinforce TKZN statistics that suggests that majority of the foreign tourist market is made up of the UK and other European countries and the same applies for uThukela. This can also be seen through stakeholder consultation. Majority of the domestic tourists visiting uThukela is made up of Gauteng, KwaZulu-Natal and the Free State. This is due to the favourable location of uThukela, being on the border of the Free State and along the N3 to Gauteng and other areas in KwaZulu-Natal.



• Ezemvelo KZN Wildlife Facilities

The facilities shown in the graph below all fall mainly within the Drakensberg region in uThukela and include the local municipalities of Okhahlamba, Imbabazane and uMtshezi LMs. The total amount of visitors for four quarters (April to April) is 118 383. The trends of the day visitors to the facilities are shown in the graph below. From April 2010 to September 2011, 163 484 people visited the Okhahlamba, Imbabazane and uMtshezi municipalities of uThukela for EKZNW facilities. Weenen Nature Reserve falls in uMtshezi as well as Wagendrift Dam (31 451 visitors), Didima, Spioenkop and Royal National Park (with 112 786 people visiting) falls under Okhahlamba and the rest in Imbabazane (19 247). Okhahlamba receives the most amount of visitors which is due to the Drakensberg and the Royal Natal National Park.



Given the statistics provided by EKZNW, shown on the graph above, Spioenkop which is famous for the Spioenkop Battlefields accounts for 23 595 visitors a year. Spioenkop is famous for more than just the Battlefields; there is the Spioenkop Dam and Nature reserve with a host of facilities. The trend indicates a decrease in the amount of visitors and therefore demand. The busiest time of year is between October to March with the most amount of visitors. The Spioenkop battlefields itself was visited by 5236 people April 2010-March 2011. 5450 in the previous year (09/10) and 5800 in 08/09 as indicated by Amafa. As indicated by the Battlefields Route association there is set to be a decrease in demand by about 25% in 2012.

- **Accommodation**
 - Occupancy Rates

The demand for camping sites is generally on an increase in EKZNW sites as seen by the table below. The statistics are incomplete, however, through stakeholder consultation there was evidence that camping sites are full during peak time during the December holiday.

	Didima		Injisuthi	RNNP		Spioenkop		Wagendrift		Weenen	
	Pax	Site	Pax	Pax	Site	Pax	Site	Pax	Site	Pax	Site
2009/2010	4350	-	13%	3237	-	-	15%	-	16%	7	5%
2008/2009	3901	-	11%	2569	-	-	13%	-	14%	4	3%
2007/2008	3238	-	-	-	-	-	16%	-	15%	-	-

Table 8 – Occupancy rates for Camping sites in uThukela falling under Okhahlamba Drakensberg (Source: EKZNW and Urban-Econ)

The demand for Thendele lodges and cottages has shown a decrease in 2010. Thendele is located in the Royal Natal National Park. There is a general need for upgrading of facilities in the Thendele vicinity.

Year	Lodge		Cottage	
	Thendele		Thendele	
	Bed	unit	Bed	Unit
2009/2010	35%	37%	37%	42%
2008/2009	41%	52%	42%	52%

Table 9 – Statistics for Thedele accommodation near the Royal Natal National Park (Source: EKZNW)

Chalet occupancy rates have generally decreased in 2010 since 2007, for all except Giants Castle and Wagonsdrift. On average chalets are not more than 46% full. Interviews with various BnBs indicated that the demand was high and there was full occupancy during the week for business tourists, this can be deduced for BnBs in Ladysmith and uMtshezi LMs. The results do not address resorts and hotels in detail, however, there are mixed views on demand with resorts and hotels. It was indicated by the resort association that there is an oversupply of accommodation, with a reduced occupancy and a decrease of visitor numbers in Drakensberg.

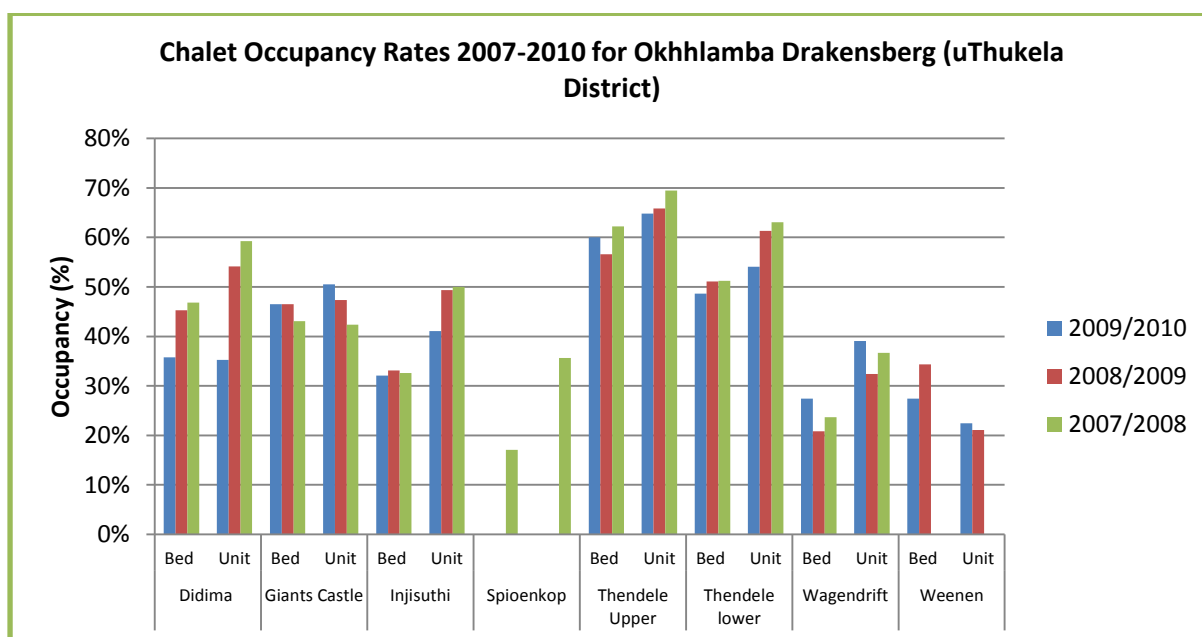


Figure 24 – Chalet occupancy rates for Ezemvelo KZN Wildlife administered areas (Source: EKZNW and Urban-Econ)

48 % of accommodation respondents regard demand for accommodation to be medium to high mid week and 80 % receive medium to high demand during weekends, which suggests that the areas is largely for holiday purposes which is true for the Battlefields and Drakensberg, however, business tourism is thriving in Emnambithi and Estcourt.

• Museum Statistics

The general trend is that more international tourists visit from February till May and local tourists from June until January. Overall there are more domestic tourists than international showing a positive sign for the domestic market which is prioritised through the various policies. The graph below shows the general trend for the collective visitors for all the museums combined (that is,

Winterton, Weenen, Fort Dunford and the Seige Museum). The general trend is that the local tourists make up almost twice the amount of international tourists frequenting the museums. This is positive for the domestic market but the numbers are still low. All together there are 8700 domestic tourists and 3230 foreign tourists frequenting the museums per year. The peak time for foreign tourists seems to be during the first half of the year, February, March and April. The graph shows an erratic trend for the domestic tourists with its peak in June/July, probably due to the school vacation and the winter season. Winterton Museum has the most domestic visitors per year, followed by the Seige Museum and then Fort Dunford then Weenen. With regard to international tourists, Weenen has the most at 1837, followed by Winterton with 1333, then Seige with 1217, lastly Fort Dunford with 61. The above statistic collected are just an estimated indication as these are taken from visitor statistics books and not everyone is obliged to sign the visitor books, therefore they provide an indication and not precise statistics.

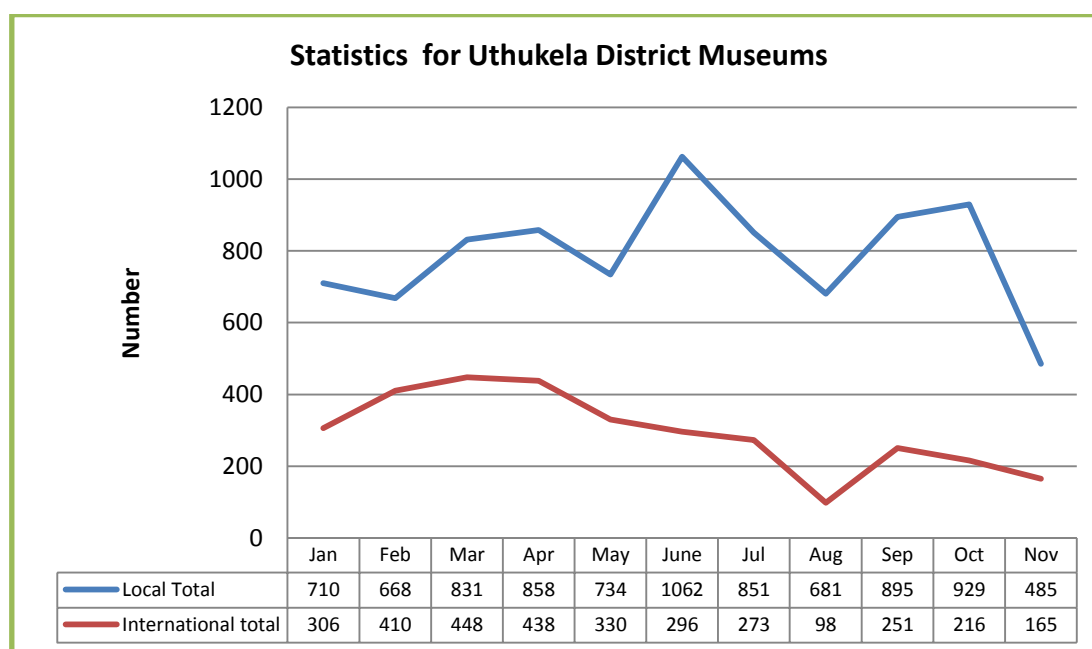


Figure 25 – Trends for the Museums in UThukela District (Source: Department of Arts and Culture and Urban-econ)

- **Events demand**

As indicated through stakeholder consultation, events are in demand in uThukela and should be enhanced. Emnambithi and Imbabazane host many local and international events which always obtain full attendance. A famous event includes the White Mountain Festival. The event's organiser has indicated that attendance has been growing from 800 in 2006 to 1500 in 2011. The yearly event creates business for the nearby accommodation service providers during the time of the event and are fully booked by the end of May which is four months ahead of the actual event which is held in September every year. Due to the performers at the event being from provinces other than KZN, there is a large pool of people coming from Gauteng and Western Cape. The demand is complimented by adequate advertising and marketing. The demand for visiting the area is increased by the White Mountain Festival as it exposes the area, and people generally return and by word-of-mouth. Tourist establishments and businesses benefit from an influx of visitors over the festival weekend. In addition, the festival also serves to create business opportunities for members of the community, not only as suppliers but also through its food and craft markets.

- **General (Tourism Information Office Statistics)**

Mondays, Thursday, Saturdays are indicated as the busiest days at the uMtshezi tourism office in Escourt. It is evident that there are quite a vast number of scholars who go to the tourism office for assistance. uMtshezi will be implementing a tourism awareness programme for scholars. This can be seen as an opportunity for the district to implement a district wide educational programme for tourism awareness throughout the district. It is evident from various interviews with the tourism officials that tourism awareness creation is important as communities and scholars often are not knowledgeable about tourism and this serves as a hindrance to tourism development.

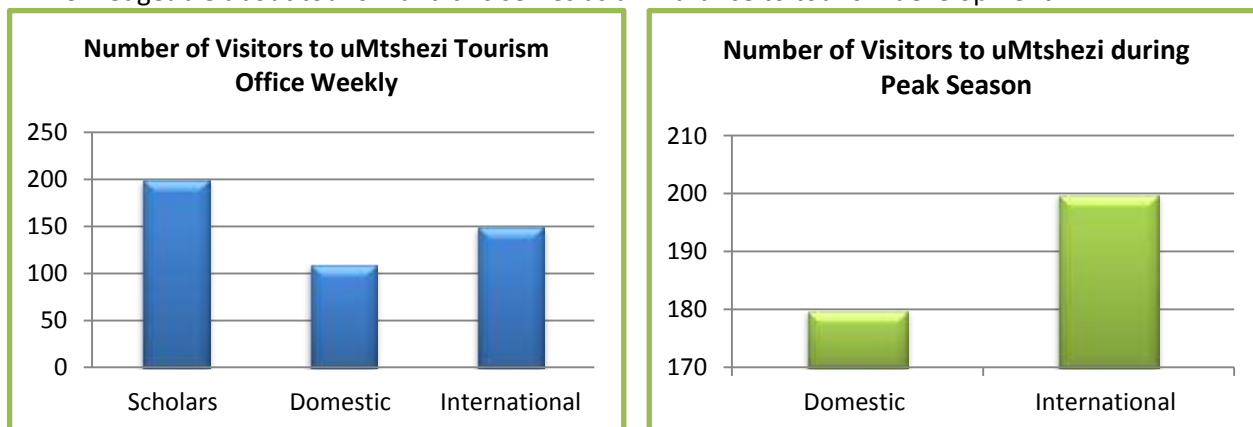


Figure 26 – Number of tourists to UMtshezi tourism office (Source: UMtshezi LM and Urban-Econ)

The graph below shows a low number of tourists visiting the Bergville tourism office with the most amount of visitors in February and June. Given the records from the visitor book, the main reasons for visit, 90 % overall were on holiday and the rest were on either business trips or there for research. An estimate of 60-65 % of people visiting stay for 1 – 3 days and approximately 40 % stay for longer than 3 days. There are more domestic tourists than international. When compared to uMtshezi this seems to be the general trend. International visitors are mainly from Germany, France, UK, USA and other parts of Africa. The general comments are that the services are good.

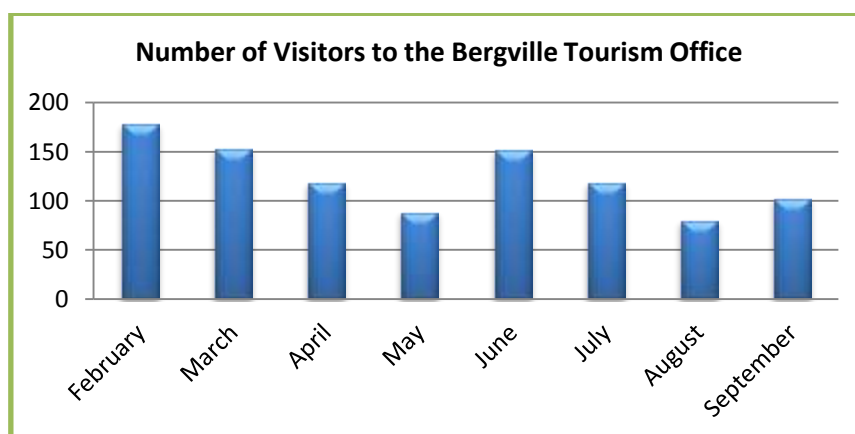


Figure 27 - Trend of Visitors to Bergville Tourism Office (Source: Okhahlamba LM and Urban-Econ)

The table below is a summary of the statistics obtained from the various sources. As indicated by the table below a total of 164 292 visitors entered UThukela in 2010. However, it was found that it is quite difficult to get an accurate database of visitor statistics for all areas and tourist attractions in UThukela DM, therefore the statistic presented are a mere indication of the number of visitors that enter uThukela DM. the general trend when compared to KZN statistics however, is that there is a thriving domestic market in UThukela DM. Due to the inefficiency of available statistics, generalised

statistics were used from the TKZN estimates. It is clear to see that Okhahlamba LM attract most of the tourists to UThukela, followed by Imbabazane and UMTshezi LM. Indaka does not feature as there are limited tourist attractions and no information office for statistics to be collected. The figures in the table below exclude a large amount of the Battlefields and visitors that events attract.

Local Municipality	Tourism Product	Local	International	Total	% Int	% Local
Emnambithi LM	Seige Museum	4140	1217	5357	23%	77%
UMTshezi LM	Fort Dunford Museum	2335	61	2396	3%	97%
Okhahlamba LM	Winterton Museum	4152	1333	5485	24%	76%
UMTshezi LM	Weenen Museum	2217	1837	4054	45%	55%
UMTshezi LM	UMTshezi Tourism Office			23400		
UMTshezi LM	UMTshezi Peak times			1950		
Imbabazane LM	White Mountain Festival			1500		
Okhahlamba LM	Bergville Tourism Office			1767		
Okhahlamba LM	Didima Camp			14164		
Okhahlamba LM	Garden Castle			4718		
Imbabazane LM	Giants Castle Nature Reserve			7041		
Imbabazane LM	Injisuthi Camp			679		
Okhahlamba LM	RNNP			49451		
Okhahlamba LM	Spioenkop Nature reserve			17223		
UMTshezi LM	Wagendrift Nature Reserve			21156		
UMTshezi LM	Weenen Nature Reserve			3951		
	Total Visitors			164 292		

Table 10 - Summary table of Statistics collected for UThukela DM (Source: EKZNW, AMAFA, Department of Arts and Culture, Bergville Tourism Office, UMTshezi Tourism office, Winterton Museum, Emnambithi LM)

2.6.4.1 Estimated Number of Tourist trips to uThukela

The table below shows an estimated average number of **trips** made annually to uThukela annually. Please bear in mind that this may not necessarily include all events as data is inconclusive regarding events and many attractions and therefore a solid conclusion according to trips cannot be made at this point, other than to say whether it is in demand or not. The estimates are made according to the statistics obtained from the latest Tourism KZN 2011 brochure and correspond with the above analysis with actual numbers provided by stakeholders. The main reasons for purposes of estimating were influenced by the below mentioned factors:

- Accessibility: uThukela is highly accessible through the N3, N11 and various regional road networks.
- Facilities: uThukela has a wide range of tourism products relating to the Battlefields and Drakensberg, with the likes of the Seige monuments and Royal Natal National Park and various nature reserves (Spioenkop, Giants Castle, etc) which include adventure activities, eco-tourism, cultural and heritage tourism etc.
- Visitor Book numbers and other statistics and interviews with the various stakeholders.

UTHUKELA TOURIST PICTURE 2010							
Regions of uThukela	Source Origin	Average Annual Number of Trips to uThukela	Average number of trips per person to uThukela	Average spend per visitor	Total Market Value	Average Length of stay	Main Country/Province of Origin
Drakensberg (82%)	Foreign	126 492	1	7215	R 912 640 970	6.8	U.K, Germany, Netherlands, U.S.A
	Domestic	295 148	2.4	710	R 209 555 353	4.5	Gauteng
Battlefields (18%)	Foreign	36 475	1	7215	R 263 167 269	2	UK, Germany, Netherlands
	Domestic	54 713	1.5	710	R 38 845 896	2	Gauteng, KZN
Total Average Annual Trips to uThukela	512 828 trips (162 967 foreign trips and 349 860 domestic trips)			R1 .4 bn			

Table 11 – Table showing the tourist picture in uThukela DM (Source: TKZN and Urban-Econ)

2.6.4.2 Market Segments in uThukela

The main tourist destinations in uThukela are assumed to be Adventure and sports tourism, Heritage tourism and nature tourism. Other types of tourism include niche tourism such as avi-tourism. This influences the category of market segments which visit uThukela. The market segments are further discussed below. The top market segments which have been deduced from the survey are shown in the graph below. The general international trend is the largest percentage is the families segment followed by “wanderlusts” and then ‘Next Stop South Africa’.

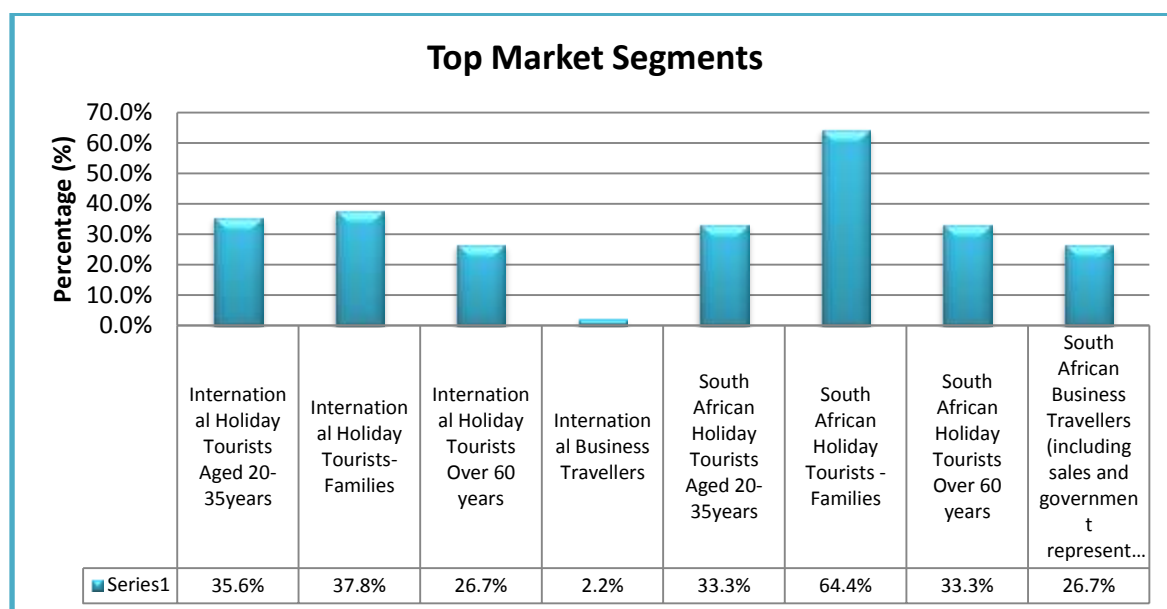


Figure 28 – The Top Market Segments visiting UThukela DM (Source: Urban-Econ Online Survey)

2.6.4.2.1 Strategic National Tourism Consumer Segmentation⁴²

Please note that with regard to the KZN Tourism Master Plan 2011, refined and redefined market segments will be proposed in future to include a new experience based matrix which is not defined at this stage therefore the previous segmentation has been utilised.

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

- **Wonderlusts (including upscale wonderlusts):** The “Wanderluster” segment is made up of younger singles or couples, with average ages ranging between 24.8- 35.8. They generally do not have children. They are young urban professionals, who travel between one and twice a year, earn higher incomes and are generally widely travelled. When visiting a destination, they seek nature, culture and adventure, and are particularly drawn to an “urban vibe”. While also concerned with issues of safety and comfort, these consumers are driven more by the emotional appeal of a destination and its diversity. They are generally the most positive segment towards South Africa in every market but they also want to travel the world.
- **“Next Stop South Africa”s (NSSAs):** The NSSA segment is South Africa’s traditional market, because of their interest in culture, nature and wildlife. They are usually wealthy married couples. They are usually between 40 and 75 (ave age 57.3) and are experienced travellers whose children (usually older) do not stay with their parents anymore. They are drawn to natural beauty and authentic cultural experiences. Their concerns are luxury and safety.

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

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

Foreign visitors to uThukela are made up of the “Wanderluster” and “Next Stop South Africa’s” market segments and include Family Travellers. The battlefields market segment is made up of mainly people over 30 years of age.

⁴² As taken from the document: Seymour. J. 2009. Towards an effective Segmentation Approach for the KwaZulu-Natal Domestic Tourism Market (5th Edition)

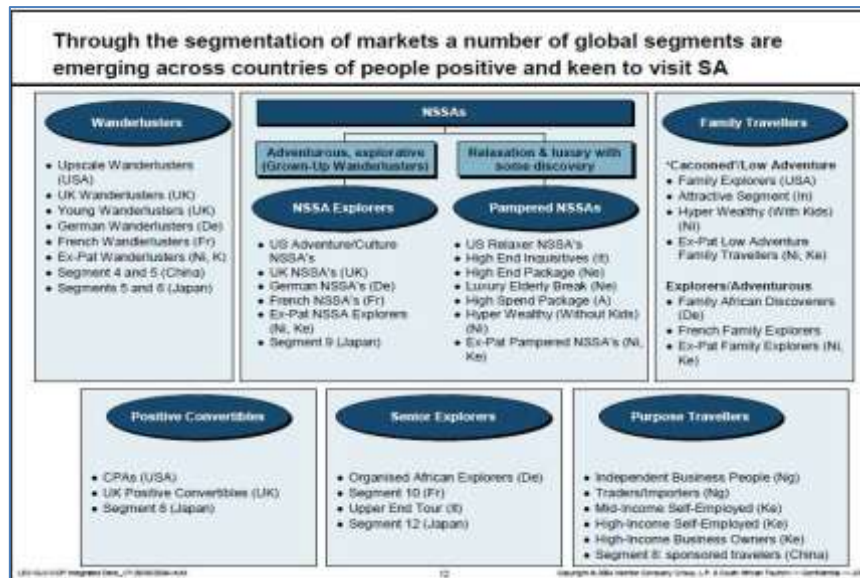


Figure 29 – international Market Segmentation (Source: Seymour J. 2009. Towards an effective Segmentation Approach for the KwaZulu-Natal Domestic Tourism Market (5th Edition))

The table below provides a breakdown of the current foreign consumer market to uThukela District based on TKZN stats and the SAT market segmentation together with the exclusive character of uThukela as a major tourism destination. The market segments chose in accordance to characteristics identified through stakeholder consultation and the demand analysis above are indicative of the segments chosen for the foreign visitors. These market segments include wanderlusters, NSSA's and family explorers. As indicated in Figure 28 below, the foreign market potential of these chosen market segments are interested in nature and wildlife, culture, visiting mountains, sport and adventure. There are also a growing number of business tourists coming to uThukela; however numbers are indefinite at this stage and would need to be researched and collated further.

A breakdown of the current foreign consumer market to uThukela				
Market Segment	Wanderlusters	NSSA	Family Explorers	Total
Primary source origin	Germany, U.K, Netherlands	Germany, U.K, Netherlands	USA	
Percentage split of tourists to uThukela	35 %	27 %	38 %	100%
Average Annual Trips to uThukela	57 038 trips	44 001 trips	61 927 trips	162 967 trips

Table 12 - Key International Market Segments Visiting UThukela DM (Source: Urban-Econ)

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

- **Young and Upcoming:** Young black and usually under 30, the majority of this market is male and have few responsibilities. They are mid to low income earners (LSM⁴³ 5-7) and enjoy city life, braais and parties with friends, soccer and kwaito music. They are primarily from Gauteng, Western Cape (WC) and Eastern Cape and travel mainly intra- provincially within and to KZN and the Eastern Cape.

⁴³ The LSM (Living Standards Measure) has become the most widely used marketing research tool in Southern Africa. It divides the population into 10 LSM groups, 10 (highest) to 1 (lowest), according to income, household assets, and basic services which determine a household's general standard of living. The rationale behind the concept of LSMs is that income alone is too narrow as an indicator of the economic standard of living of households.

- **Independent Young Couples and Families:** These families are primarily high income earners from Gauteng with higher paying jobs (LSM 8-10), they have school aged children, and are interested in relaxing family holidays in KZN usually on the beach. They are also interested in classical music concerts, and enjoy rock and pop, and eating out.
- **Striving Families:** These families are mainly from Gauteng, are mid to low income earners (LSM 5-7), and have kids of primary and high school age. They are hardworking and focussed families who rigorously save up to go on holiday to visit family usually in KZN and Gauteng in large family groups.
- **Well off Homely Couples-** These couples are well paid professionals from KZN and the Western Cape who seek tranquil and romantic holidays. They are usually LSM 8-10, are over 30, white, and do not have children. They mainly travel intra provincially to KZN and WC, and sometimes to the EC.
- **Home Based Low Income Couples-** These are lower income couples from the EC, WC and KZN, who like to travel intra provincially. They are usually around 40 years old and have children who are of high school age or who have completed schooling. When going on holiday they visit friends and family, and enjoy going to church, cooking and gospel music.
- **Basic Needs Older Families-** These families are much like the former market segment, but are usually older families whose children are of working age and support the family.
- **Golden Active Couples-** These are couples who have generally retired and have retirement funds which have long been saved for. They are white and are mainly of the LSM 9 -10. They closely monitor their spending, and therefore when on holiday opt for self-catering and camping facilities.

Domestic Visitors to uThukela are made up of Young and Upcoming, Families and Well off Homely couples, together with business travellers.

The illustration below groups the above market segments which collapses similar segment with similar characteristics together. With regard to UThukela District, the results of the survey are combined with the characteristics of the market segments illustrated below result in the table formulated with a breakdown of the current domestic consumer market in uThukela District.

YOUNG, 30 AND OLDER		MIDDLE, 31-50		OLD, OVER 50	
LIVING WITH PARENTS	NOT LIVING WITH PARENTS	HIGH INCOME > 10 000		BLACK	WHITE
Never took a holiday trip	Segment A Young and upcoming	Segment D Well-off homely couples	Segment F Basic Needs older families		Segment D Well-off homely Couples
Intra-provincial travel			Segment E Home-based low income couples		
Inter-provincial travel	Segment B Independent young couples and families		Segment E Striving families		Segment G Golden active couples

Figure 30 – Domestic Market Segments (Source: Tourism KZN Statistics Brochure 2011)

Certain segments have been targeted for more rigorous marketing. This includes the NSSA market and the wonderluster market, as well as all local segments. The table below matches demand with supply as it illustrates the activities supplied by uThukela District, and the relevant market segments and the allied market potential per attraction. The figure below indicates the relevant market potential for the key consumer market segments, bit foreign and domestic. The highlighted parts are relevant to uThukela District.

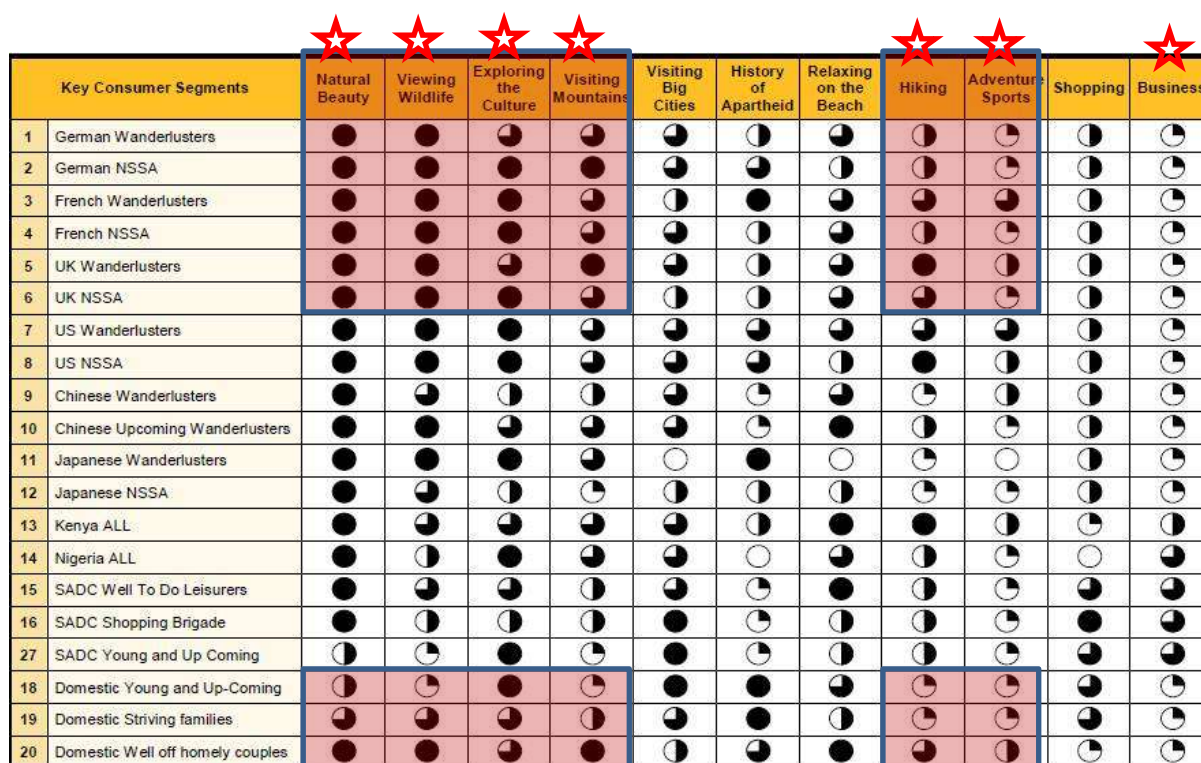


Figure 32 – Relevant Market Potential for key consumer market segments (Source: TKZN Stats Brochure 2011 and Urban-Econ)

The table below provides a breakdown of the estimated current domestic consumer market in uThukela District based on TKZN Stats and SAT market segments and the uniqueness of the domestic market infiltrating uThukela District. It is important to note that other segments do exist which include scholars and researchers, however, the below chosen segments make up the vast amount of visitors which create revenue. These estimates include both the Drakensberg and Battlefields regions. The figure above indicates that domestic well off homely couples are more likely to visit areas for purposes of Natural Beauty, Viewing wildlife, exploring the culture and visiting mountains, the same can be said for families, however young and upcoming are most likely to explore culture and natural beauty.

A breakdown of the current domestic consumer market to uThukela					
Market Segment	Young and Upcoming	Families	Well off homely couples	Business Travellers	Total
Primary source origin	Gauteng, Western Cape, Eastern Cape	Gauteng, KZN,	KZN, Western Cape, Gauteng	Gauteng, KZN	
Percentage split of tourists to uThukela	21 %	41 %	21 %	17 %	100%
Average Annual Trips to uThukela	74 009	146 532	74 009	74 009	349 860

Table 13 – Key Domestic Market Segments Visiting uThukela District (Source: Urban-Econ)

2.7 Baseline indicators for uThukela District Municipality

The following table provides baseline values for key tourism indicators in uThukela DM. These indicators have been taken from the NTSS and KZN Master Plan. Where values were given for South Africa and KZN, they have been included. The estimated baseline figures presented for uThukela DM have been derived from various sources which are described in the table, however, in many cases values could not be derived due to lack of information. This lack of information is critical to the success of the tourism sector in uThukela DM. Therefore it is noted that it is necessary to gather information in order to form accurate indicators and targets which indicate demand for tourism and could also indicate growth trends and characteristics. The table below provides suggestions on possible ways of data collection.

Focus	Measure	National & Provincial baseline values (2009/10)	uThukela baseline values (2010)	Source of indicator value
GDP	Direct GDP impact	National: R71,4 bn (3% of GDP)	R 188 mn (2 % of district total GVA)	Based on values for catering & accommodation sector only (Source: Quantec Regional Data, 2010)
		Provincial: R22bn		
	Direct & Indirect GDP impact	National: R189,4 bn (7,9% of GDP)	R 342.2 mn	National Input-Output table (Urban-Econ, 2010)
		Provincial: R33bn		
Visitor/Trip Numbers	Foreign (holiday)	National total: 9 933 966	122 967 visitors	Urban-Econ estimates based on TKZN number of visitors to the Battlefields and Drakensberg
	Foreign (business)	Provincial total: 1 213 001	40 000 visitors	
	Domestic (holiday)	National Total: 14 600 000	275 860 Trips	
	Domestic (business)	Provincial Total: 8 800 000	74 000 Trips	
Employment	Direct	National: 389 100	2968 people	Employment in the catering & accommodation sector (Quantec regional data, 2010)
		Provincial: 100 000		
	Direct and Indirect	National: 919 800	4544 people	National Input-Output table (Urban-Econ, 2010)
		Provincial: 133 000		
Investment	Public	National: R82,4 bn	no baseline data available	Investment data can be gathered from building plans approved and amount spent on new tourism projects in uThukela DM
	Private	no baseline data	no baseline data available	
	Foreign Direct	National: R3 bn	no baseline data available	
Transformation	No of companies with a BEE scorecard	no baseline data available	no baseline data available	It is recommended that this information is gathered through CTOs or tourism
	No of companies with high	no baseline data	no baseline data	

	level accreditation	available	available	bodies. Alternatively, a survey can be conducted annually
	Number of companies reaching tourism charter targets	no baseline data available	no baseline data available	
	Number of black majority owned companies	no baseline data available	no baseline data available	
Rural Tourism demand	Number of visitors to rural businesses	no baseline data available	no baseline data available	Information should be gathered at each rural attraction and accommodation facility
	Number of attractions in rural areas	no baseline data available	no baseline data available	Information to be gathered through CTO
Number of bed nights in low season months	Foreign	National: 15.80%	no baseline data available	Occupancy information needs to be gathered from every accommodation place available uThukela DM
	Domestic	National: 5.30%	no baseline data available	
Visitor Experience	Number of visitors whose experience meets or exceeds their expectations	no baseline data available	no baseline data available	Service excellence survey, or customer satisfaction cards is necessary to gather this information.
Awareness	increased levels of awareness of tourism and its value	no baseline data available	no baseline data available	This can be assessed in future through surveys as well as investment.
	Increase in levels of community participation	no baseline data available	no baseline data available	
Events & MICE market growth	Number of events > 1000 people	no baseline data available	no baseline data available	Requires district level co-ordination of events
	Economic Impact Assessment of Events	no baseline data available	no baseline data available	Requires economic impact surveys
	Number of meetings and conferences	no baseline data available	no baseline data available	Each conference venue to provide data
Niche Market Growth	Number of visitors per niche market	no baseline data available	no baseline data available	Data to be gathered by niche markets and made available to uThukela DM

Table 14 Baseline Indicators based on NTSS and KZN Master Plan indicators (Source: Urban-Econ)

2.8 Institutional Analysis and Tourism Enabling Environment Analysis

2.8.1 General

The following section addresses the institutional arrangements of the relevant tourism bodies/stakeholders and associations affecting tourism in uThukela District. This will be done at a local municipality level in order to gain a thorough understanding of who is involved and the structures in place. By structures meaning, whether or not there are local tourism forums, community tourism associations and allied associations. The tourism enabling environment relates to all things that would enable, facilitate and coordinate tourism development in a given area including tourism forums and entities.

Tourism in uThukela falls under Strategic Planning and Economic Development incorporated in the economic development section as shown in the figure below. Tourism is an integral part of economic development and there is a designated Senior Tourism Officer who is qualified with a Diploma in Tourism. The 2011/2012 IDP review indicates that this position is filled however; there is a vacant position for an assistant tourism officer available. UThukela District has applied for a tourism intern with the Department of Economic Development and Tourism, which assists with the deployment of

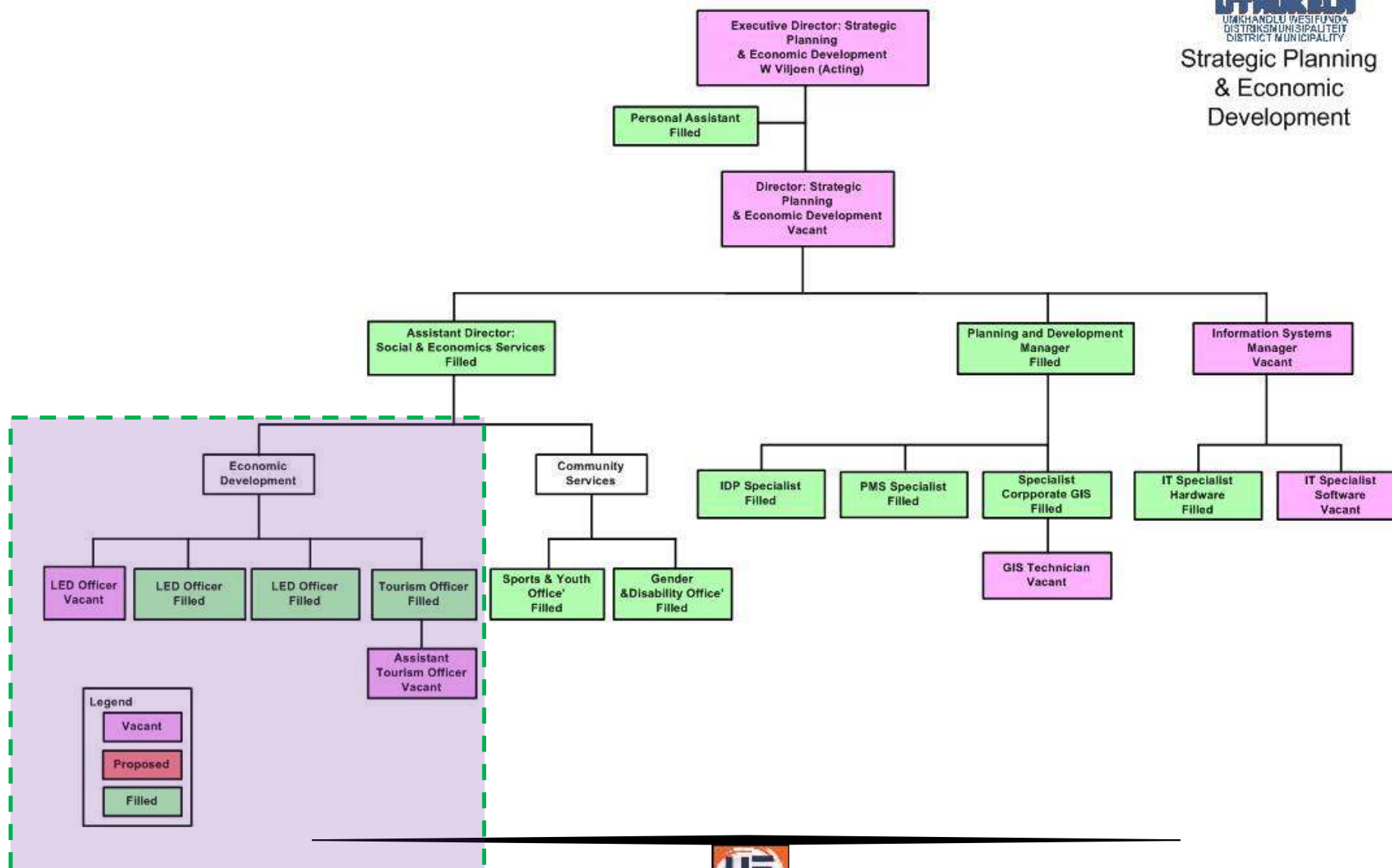
additional staff. The advantage to the uThukela institutional structure is that there are designated tourism personnel which places emphasis on the sector as tourism is one of the major economic sectors of uThukela District. An advantage to uThukela is the recently appointed District Mayor who has a renewed focus on tourism and acknowledges the role that tourism plays in local economic development.

Through stakeholder consultation it was established that interns are taken in and trained, however, these interns are temporary and leave after a short while. The gap here is that a permanent staff member needs to be employed in order to assist with on-going planning, management and evaluation. It was established that at UMTshezi a similar problem exists with staffing as there is one designated tourism officer available at the tourism office. Overall, for the local municipalities, only Indaka does not have a designated tourism officer. The LED officer is responsible for all economic related functions, tourism included. Through the surveys and further consultation a need was established to further train and capacitate the local tourism information officers (who are interns) especially at Bergville and Winterton information offices. The known museum curators that exist are at the Siege Museum, Weenen and Bergville museums and a private person at the Winterton Museum who is available on week days only. The problem with the museums is that they are not open 7 days a week, probably due to staff shortages. In certain cases there are supporting staff to fill in at the museums when the tourism information officers are not available. There is an Ambassadors Programme for in-service training which allows uMTshezi to take on interns.

Okhahlamba has tourism officers at the tourism offices and a tourism manager, as well as museum curators this is also the case with Emnambithi. Indaka does not have a designated tourism officer; the LED officer manages the tourism function as well. Imbabazane has a tourism officer as well as UMTshezi. The table below is indicative of the tourism structures and staff in place throughout UThukela and the local municipalities. The table below also shows the local municipalities which have tourism information offices and those which do not. Indaka and Imbabazane do not; however, Imbabazane has applied for funding from the National Lottery for an information office. Other information offices that exist, is in Central Drakensberg, which is run by the Bushman's River Association.



Strategic Planning
& Economic
Development



UThukela does not have a District tourism Association. The importance of having this body is that it creates an enabling environment for tourism development in uThukela District. The communication between the district and local municipalities is supposed to be in a form of the District tourism forum and local tourism forums. Items that are of importance to the local municipalities which arise from the Provincial Tourism Forum (PTF) are communicated via email from the Senior Tourism Officer to the respective local municipalities. The uThukela IDP states that an UThukela District Tourism Forum has been established on the 4th August 2009. However, it is not function at the moment and has not taken place in a very long time, a mitigating factor being that at the local level, the structures are not in place. The forum should consist of the representative from all the local municipalities, Private sector and provincial department responsible for Tourism. The committee is to be chaired by the Deputy Mayor of uThukela district municipality. The main responsibility of the forum is to integrate the provincial tourism objectives into district plans and priorities and also inform the district budgetary process for the effective implementation of tourism in line with provincial objectives. Only two of five of the local municipalities have local tourism forums. Tourism information offices under renovation at the moment are the tourism office at Colenso. Currently as show by the table below, all except Emnambithi and Indaka Local municipalities belong to a C.T.O. Emnambithi is in the process of establishing its own C.T.O.

Okhahlamba LM has a development agency which consists of two tourism directors dedicated to tourism in Okhahlamba. This agency is funded by the IDC. The purpose of the development agency is 'to identify catalytic projects that have the potential to create significant new opportunity for economic growth, diversification as well as socio-economic transformation'⁴⁴. This growth is envisaged to lead to the creation of new jobs and entrepreneurial opportunity.

Municipality	L.T.F	C.T.O	D.T.F/ D.T.A	Tourism officer/s	Museum Curators	Tourism Information Office
UThukela DM			No			
UMtshazi LM	No	No		Yes – Estcourt	Yes – Fort Dunford and Weenen	Yes - Escourt
Okhahlamba LM	No	Yes		Yes – Bergville and Winterton	Yes – Winterton private person	Yes – Bergville and Winterton
Imbabazane LM	Yes	Belong to the N3 Gateway however do not have one for the LM which is forthcoming		Yes – based at the municipality	-	No (Applied for funding for a museum and information office)
Emnambithi LM	Yes	No - forthcoming		Yes	Yes – Seige Museum	Yes– Ladysmith, Colenso and Van Reenen
Indaka LM	No	No (not a substantial amount of tourism and product owners)		no	-	No

Table 15 - Breakdown of tourism structures and staff per local municipality and uThukela District (Source: Stakeholder consultation and Urban-Econ)

⁴⁴ <http://www.okhahlamba.com/>

The Community Tourism Organisations and other tourism related organisations that the local municipalities belong to or are involved with tourism in UThukela are as follows;

ORGANISATION TYPE	NAME OF ORGANISATION
Tourism Associations:	Ladysmith Tourism Association
	Bushmen's River Tourism Association
	Okhahlamba Drakensburg Tourism Association
	Battlefields Route Association
	N3 Gateway Tourism Association:
	Open Africa
	Maloti Drakensberg Tourism Association
	Van Reenens Tourism
	Okhahlamba Development Agency
Tour Guide Associations:	Battlefield Tour guides Association
	Drakensburg Adventures
	Canopy Tours
Nature Conservation Bodies: (Archaeology)	Ezemvelo KZN Wildlife
	Bergwatch
	WESSA
	Maloti Drakensberg Trans frontier Park
	SA Birdlife
	Amafa KwaZulu-Natal
	Drakensberg Bufferzone Technical Committee
	Heritage Committee

The table below depicts the role players of the local tourism forums for Emnambithi and Imbabazane local municipalities. The local tourism forums have a mix of public and private sector stakeholders at both provincial and local level which is imperative for the holistic functioning of the entity. The need rose for a mix of public and private representatives for future C.T.Os within the district. It is important to note that partnerships must also be formed with the **local Traditional Authorities and Ingonyama Trust**.

The Imbabazane L.T.F is chaired by the mayor at quarterly meetings and is made up of	Members of the Emnambithi Local Tourism Forum include the following departments and organisations:
<ul style="list-style-type: none"> Department of Arts and Culture Department of Economic Development and Tourism KZN Wildlife SAPS Imbabazane local municipality Amafa Langabalile Arts and Craft centre Provincial Department of Transport N3 Gateway uThukela District 	<ul style="list-style-type: none"> Ladysmith Municipality N3 Gateway Tourism Van Reenen Tourism Ladysmith Chamber Historical Society Siege Trust Battlefields Association Mayoral Office L/S Tourism Association (non-existent) Dep. of Arts and Culture Heritage committee Arts and Craft committee Black Chamber of commerce Members from various communities Ward committees Councillors from Support Services Committee

2.8.2 Tourism Budget

The district municipality budget is linked to the local economic development budget, which causes a hindrance since the tourism projects will then have to split budget with other LED projects. The table below shows the breakdown of the projects through the IDP for tourism for 2011/2012. The project currently underway is the review of the Tourism Plan. It was found that with the local municipalities often the tourism budget is too small to allow for any actions to be taken and often the tourism budget is integral with the LED budget therefore having to share resources or funds have to be sourced from elsewhere if possible (for example, uMtshezi relies a lot on sponsors from TKZN and Businesses). Also tourism budgets to C.T.Os are low due to limited resources. This hinders future tourism development and the growth and wellbeing of the imperative economic sector in uThukela DM and the local municipalities within its jurisdiction.

As district receives its budget from provincial government, it is important to note the procedures of budget allocation as proposed by the KwaZulu-Natal Master Plan. The need for increased local tourism activity is recognised through the KwaZulu-Natal Tourism Master Plan – Strategic Development Report Executive Summary, December 2011, which needs to come through adequate/reasonable budget allocations for LTOs. It is therefore suggested that budget requirements would be ‘R2 m – R3 million for low tourism municipalities, R5 million to R15 million for medium tourism municipalities, and R15million – R50million for high tourism municipalities’. UThukela, due to its significance in KZN and South Africa, may be classified as a ‘high tourism municipality’. However, this will differ for the local municipalities due to the inherent tourism products. For example, Indaka will be classified as a ‘low tourism municipality and Okhahlamba as a ‘high tourism municipality, due to the location of the UKhahlamba-Drakensberg World Heritage Site.

The KZN Tourism Master Plan also states that ‘The municipal budget recommendation takes into account the principle that not all municipalities are equal in tourism, therefore different levels of tourism emphasis, resources and activity are required’.

Review Tourism Plan	Operational	UTDM	2011/2012
Implementation of tourism projects as per tourism plan	R500 000	UTDM	2011/2012
Facilitate tourism forum meeting	Operational	UTDM	2011/2012
Facilitate district tourism coordinating meeting	Operational	UTDM	2011/2012

Figure 33– Tourism projects as per the UThukela IDP (Source; UThukela DM IDP 2011/2012 Review)

2.8.3 Institutional Structure

The institutional structure as proposed before the adoption of the KwaZulu-Natal Master Plan is depicted in the figure at the end of this section. The new proposed institutional structure which is proposed by the KZN Tourism Master Plan of 2011 and that should be aligned to by local, district and metro is illustrated below. The illustration indicates the options for structuring as well as the required elements.

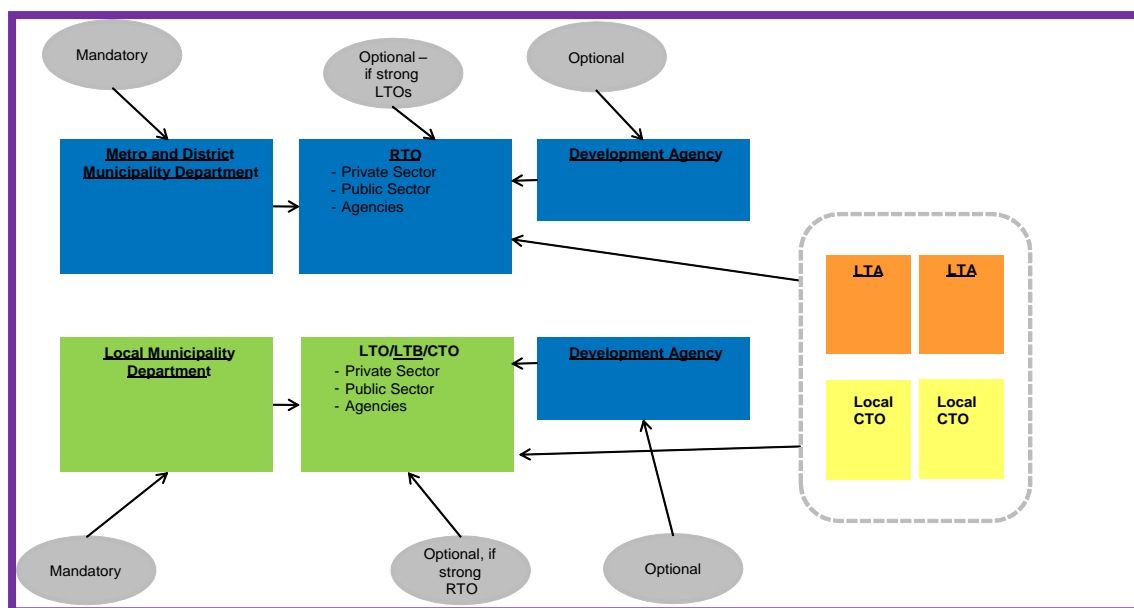


Figure 34 - Recommended Institutional Structure as per KZN Tourism Master Plan (Source: KZN Tourism Master Plan: Executive Summary 2011)

According to the Master Plan, at the metro, district and local level, 'the following aspects of the structure are non-negotiable

- All municipal (district and local) and metros must have a departmental responsibility for tourism and a resource allocation to tourism which UThukela has.
- All areas of the province should be covered by a Regional or Local Tourism Organization/Bureau/Community Tourism Organisation (RTO or LTO/LTB/CTO)'. This requirement has yet to be fulfilled by three of the local municipalities, as Emnambithi, Imbabazane and Okhahlamba LMs have either C.T.Os or L.T.Fs, whereas UMTshezi and Indaka do not. The previous KZN Community Tourism Organisation Strategy mandated all areas to have a C.T.O, whereas in the KZN Tourism Master Plan, there can either be a C.T.O or L.T.O.

According to the KZN Tourism Master Plan, 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. The challenges with setting up these organisations is that they either fall apart due to lack of resources, for example, private sector feel that they attend on their own free will and incur the costs, and are only willing to do so if the outcomes of meetings directly affect them. Therefore the perception is to not attend, as there is no benefit. The illustration above shows that a development agency is optional. In the case of uThukela there is the need for a development agency in order to drive tourism development.

Challenges related to institutional Structure:

- Limited coordination and lack of communication/synergy between private and public sector as well as the local Traditional Authorities.
- Need for shared enthusiasm from both public and private sector
- Lack of resources at a municipal level
- The issues with L.T.F for private sector is that transport and all costs incurred have to be endured by the private people which may not always be possible therefore it is hard to attend all meetings.

- The perception of: it is seen as problem that C.T.O.s are driven by the private sector who may have their own interests at hand

As identified through the previous strategy, there is still no formally organised structure at a district level, there are organised tourism bodies in the various municipalities of the district which play a role in tourism at various levels. They function for purposes of information dissemination, management, and marketing related activities for tourism in the respective local municipalities.

• Proposed Provincial Level Institutional Structure

The proposed **Provincial Level Institutional Structure** is provided below as a point of reference in order to understand the local and district institutional structure in its broader context.

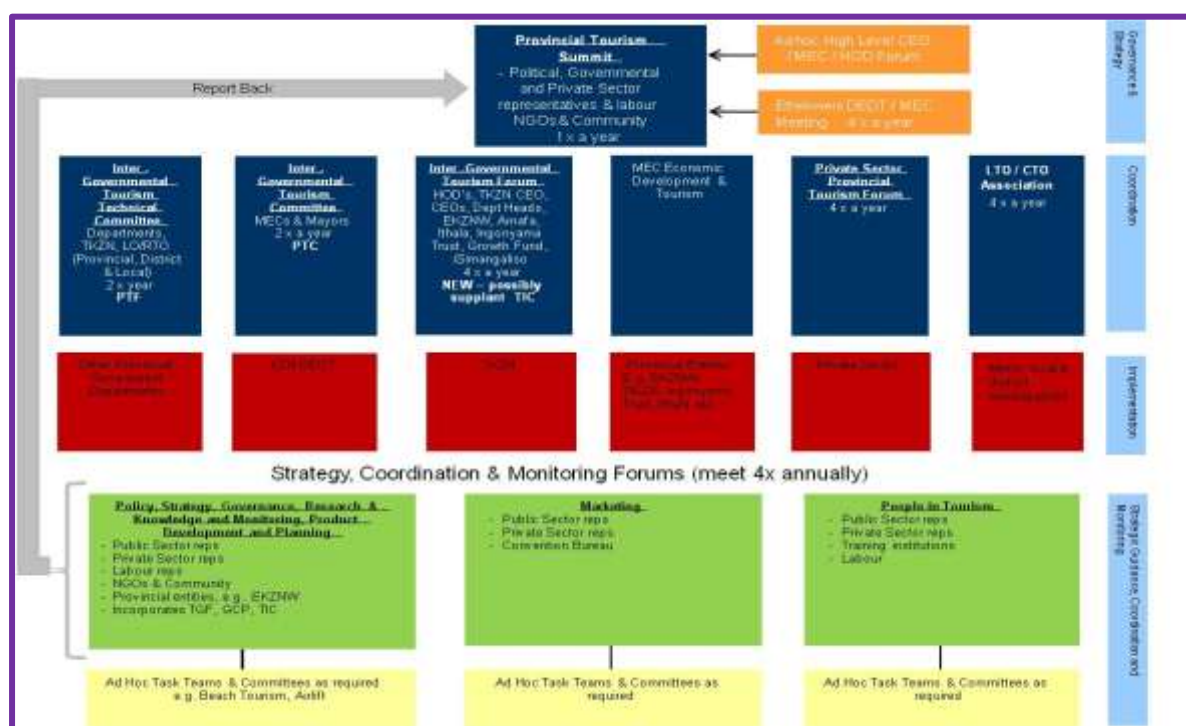


Figure 35 - Proposed Provincial Level Institutional Structure (Source: KZN Tourism Master Plan: Executive Summary 2011)

• Roles of District and Local Government in Tourism

The roles of district and local government are defined below. It is seen as imperative to uThukela and all stakeholders to understand the working relationships and functioning between local and District municipalities with regard to tourism. The following extracts are taken from a presentation given by the Department of Economic Development and Tourism in November 2011.

The role of the District council is:

- Integrating provincial tourism objectives into District plans and priorities;
- Driving the development of and implementation of local tourism policy;
- Urban and rural planning and development of tourism products and services;
- Budget for the effective implementation and growth of tourism in line with the Provincial objectives;
- Allocate Institutional capacity and dedicated and skilled Human resources to perform tourism function;
- provision of local infrastructure;
- Creation and co-ordination of tourism experience routes across its district and beyond municipal boundaries;
- Providing Tourism support to entrepreneurs and investors.

Role of the Local Government

The provincial experience offering is a combination of the local offerings. Local government is even closer to the product than the national or provincial governments. The exact role of the local governments in the tourism development thrust will be determined by local conditions existing at the provincial levels and most importantly, the availability of the necessary financial means and skills base to carry respective functions. Local government must be organized to deliver on:

- Integrating tourism policies into local economic development plans;
- Implementing local tourism policy;
- Maintenance of specific aspects of the tourism product at local level;
- Provision and maintenance of tourist services, sites and attractions and public services;

Maintaining database of registered tourism products and service providers;

- Drive quality assurance
- Provision of local infrastructure;
- Health, safety, licensing and local by-law compliance;
- Local information services;
- Facilitate the participation of local communities in the tourism industry

Community Tourism Organisations and previous Institutional Structure

The KwaZulu-Natal Community Tourism Organisation Strategy produced by the Department of Economic Development and Tourism provides a framework to ensure coordination of tourism marketing and publicity, provide an institutional framework for C.T.O.s at local government level, to facilitate equal access to opportunities by local communities, ensure legal requirements and establish linkages between, private sector, communities and government. The concept of Community Based Tourism Associations is advocated by the White Paper on the Development and Promotion of Tourism in South Africa (1996) and Kwa-Zulu Natal White Paper on the Development and Promotion of Tourism (2008). The figure below summarises the ideal structure of the operations of the structures at the local, provincial and national level as well as for the private and public sector. According to the CTO Strategy, the LM is to provide an information office to be run by the C.T.O. District role with regard to Tourism offices for C.T.O.'s as per the KZN Community Tourism Organisation Strategy is: The district municipalities shall co-fund the activities of the CTO, mainly the tourism routes, generic sub-destination marketing and attendance at marketing platforms.

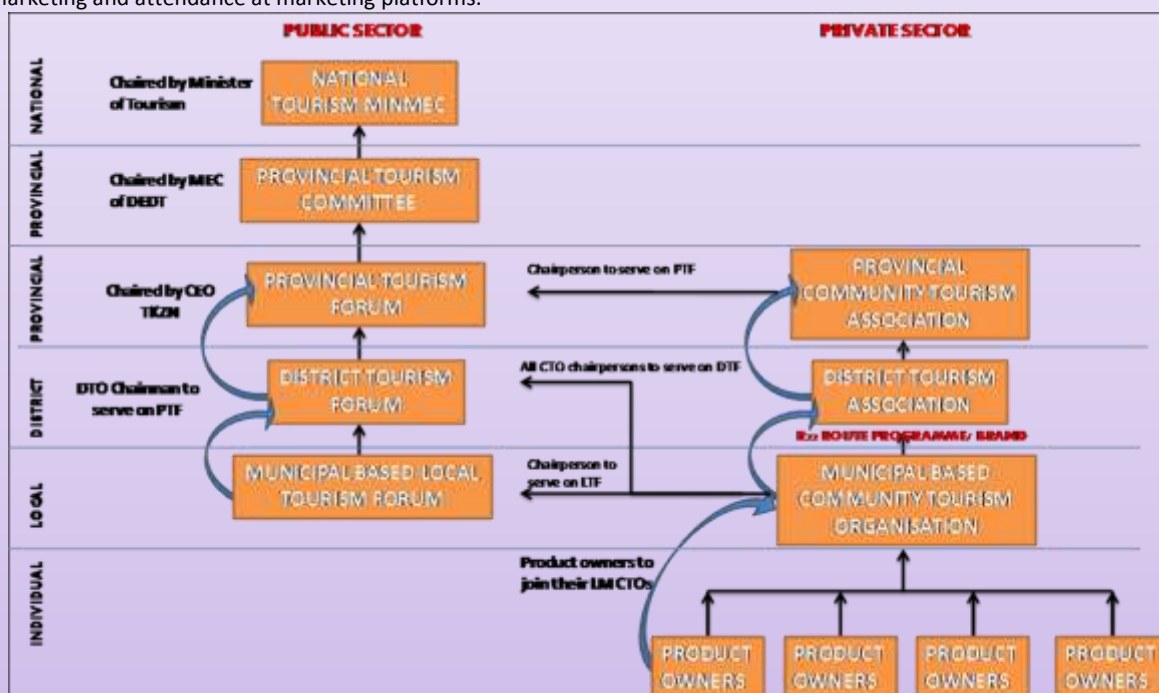


Figure 36 - Institutional Structure and CTO mandate

Associations involved with heritage and history in uThukela

- **N3 Gateway**

The N3 Gateway region runs from Heidelberg in the north to Valley of a Thousand Hills in the south, traversing four provinces, namely KwaZulu-Natal, Free State, Mpumalanga and Gauteng. The region incorporates cross-border Tourism with Lesotho through Phuthaditjhaba, Caledonspoort and Sani Pass and includes the Battlefields Route up to Newcastle. The N3 Gateway is recognised by SA Tourism and KwaZulu-Natal Provincial Tourism as a key role-player in the tourism industry. It is the N3 Gateway's objective to co-operate and work with every sector of the Tourism Industry and in doing so contribute towards the development and growth of Tourism in South Africa and in

this way contribute positively towards the economy and creating new jobs in our country. It was initiated by N3 Toll Concession (Pty) Ltd (N3TC) and has, to date, been solely funded by N3TC.

The main purpose for the development of the N3 Gateway is to assist the Tourism Associations and Municipal Tourism Information Offices within the area of N3 Gateway and to collectively market and showcase their tourism experiences. In uThukela, Emnambithi, Bushman's River Tourism, Okhahlamba Drakensberg Tourism, Van Reenens Tourism etc. are all members of N3 Gateway which is very advantageous with regard to marketing as N3 Gateway are well known and expose places through various means such as Indaba, Beeld Show, internationally etc.

N3 Gateway is involved in Tourism Route development in partnership with Open Africa and SA Tourism, which provides the marketing support through the SA Tourism website, social networking media and speed marketing sessions. The N3 Gateway is registered with Tourism KZN. Sixteen Tourism Nodes or Tourism Information Centres have been identified in the N3 Gateway area, which all N3 Gateway members can utilise for distribution of their brochures and information to market their areas. N3 Gateway-hosted workshops are co-ordinated to encourage the cross marketing objectives of the organisation and to enable all those involved in tourism to learn about their neighbours' offerings.

Another marketing tool that N3 Gateway offers its Members is a free download onto touch-screen information units, operated by Hoot. Another method of marketing available to N3 Gateway members is the N3TC custom publication - Mobility. Mobility is produced three times a year – one for the Easter peak period and the second for the December peak period – and distributed at the Wilge Toll Plaza. N3 Gateway members are invited to submit articles on their areas for editorial consideration. N3 Gateway can be very beneficial to uThukela DM in terms of marketing.

- **Open Africa**

Open Africa works with communities to establish off-the-beaten-track, self-drive travel routes in a network supported by local enterprises, linking and protecting the splendours and knowledge of rural Africa. Each route clusters travel attractions and services in an area, enabling travellers to tailor their experience according to their interests, time and budget (similar in concept to a wine route). Open Africa connects communities to travellers through this website and other marketing initiatives. Routes are linked to a flagship plant or animal species, which is monitored, enhancing awareness and conservation in that area. To date there are 60 travel routes in six countries in southern Africa supporting 2 626 community-based businesses that employ 30 640 people.

- **Ladysmith Historical Association**

The Ladysmith Historical Society is a voluntary non-profit society with the various aims of promoting the historical legacy of Ladysmith and surrounding area, increasing awareness and knowledge of the our rich historical heritage and demonstrating its relevance for the present and future.

- **Battlefields Route Association**

A battlefields route association exists which is made up of a group of enthusiastic volunteers whom receive no remuneration. The function of the Battlefields Route is to create a product that will encourage people to visit the area of the battlefields and therefore encourage development within the region. The stakeholders are presently not financially able to promote the Route on their own. The Route Association is primarily responsible for the marketing of the Route and make maps and publications available to the public and to advise to the public on the Route and how to plan trips etc. **The website which the Battlefields is advertised on is www.battlefieldsregionguides.co.za.** They work in close liaison with service providers and organisations such as Tourism KwaZulu-Natal,

the Battlefield Guides Association, the various Community Tourism Offices, AMAFA and the Local and District Municipalities.

- **Heritage Committee**

This committee is based in the Emnambithi Municipal offices, until they find their own office. They are responsible for tours to heritage sites, and are involved in Battlefield campaigns among many other activities such as music and entertainment, community involvement regarding arts and craft etc. which will be discussed further in the report. The heritage committee works with Ladysmith municipality and are a Community Based Organisation.

3 S.W.O.T Analysis

The following analysis details the strengths, opportunities, weaknesses and threats related to tourism in uThukela District as gathered from the above Situational and contextual analysis.

Strengths

Tourism Products/ Attractions

There is a variety of nature based products within uThukela DM (with 14 game and nature reserves), over 290 bird species and adventure tourism materialising because of this.

UKhahlamba- Drakensberg World Heritage Site - all inclusive attractions including Tugela

Falls and Bushman's Caves

8 Ezemvelo KZN Wildlife sites administered sites

Big Five Game reserve

Cultural and Natural Heritage sites including the Battlefields and Zulu Tradition and Culture and world famous San and Bushman Rock Art and various religious places of interest.

Existing and planned cultural centres to benefit communities

32 Amafa sites

Conservation potential and protection of the natural environment – EKZNW sites

7 Dams

6 Golf courses and a range of adventure sport

International linkages with Maloti-Drakensberg Trans Frontier Route

Iconic Cable Car project prioritised through KZN Tourism Master Plan 2011

Core Nature Based experience evident in uThukela seen as priority in Tourism KZN Master Plan 2011

Renowned musicians, Ladysmith Black Mambazo and Drakensberg Boys Choir

Varied tourism experiences

Events tourism drawing visitors to the area, which exposes the district

Support Services

Excellent national linkages – N3 and N11

Existing Ladysmith Aerodrome

Existing rail network

Existing tourism offices in all three out of five LMs

Existing Museums in three out of five LMs

Current tourism awareness programmes

Highly skilled crafters

Marketing

There is a brochure at district level

District on waiting list for Indaba stand

Demand

Many foreign tourists coming into the district

The domestic market is growing

There is a range of market segments on a domestic and international scale

Institutional Structure

There is a designated tourism officer at district level

Some C.T.Os and L.T.Fs are in place

Local municipalities belong to other C.T.Os such as N3 Gateway

There are tourism officers in most local municipalities

Certain Tourism bodies in place

LMs in uThukela are affiliated with N3 Gateway and Open Africa

Opportunities

Tourism Products/ Attractions

Cable way iconic project
Introduce Community based tourism to empower rural communities
Introduce rail tourism
Grow business and MICE tourism
Capitalise on nature based tourism in keeping with the KZN Tourism Master Plan as a core experience coupled with the trend of international market segments favouring this experience.
Also mainstream niche tourism areas to increase revenue and create local employment
Preserve the natural environment
Exploit the Zulu culture and tradition in terms of tourism
Township and rural tourism
Restoration of Umsuluzi Game Reserve near Colenso
Maloti Drakensberg Route
'trans frontier trekking route'
Expansion and consolidation of Weenen Game Reserve
Ngelegele Community Game Reserve
The upper uThukela
Linkages with surrounding LMs, provinces and Lesotho
Restoration of Royal Natal Hotel

Support Services

Research and development
Transformation and skills transfer
Train local communities
Create awareness among scholars and communities
Exploit inherent skills of rural communities
Tour operators

Marketing

Brand the district and advertise accordingly
Market through alternative medians

Demand

Grow the domestic market as aligned with policy
Aim to retain and attract more international visitors
Focus on current sectors and experience in demand

Institutional Structure

Strengthen and develop the institutional structure and encourage participation and communication among stakeholders

Weaknesses

Tourism Products/ Attractions

Lack of standards with regard to accommodation
Limited/No By-laws at district level
Cultural and historical attractions not maintained
Over supply of accommodation in certain areas (Central and Northern Drakensberg – Okhahlamba) and under supply in others (Indaka and uMtshezi)

Support Services

Incapacity of interns
Museums are not open 7 days a week
Crime
Lack of staff at district level
Access roads are in poor condition, for example to Spioenkop
No signage to Battlefield on N3
The R74 is in a state of disrepair
Poor unmaintained signage in certain areas
ICT
Limited entrepreneur capacity
Lack of tour operators including car hire
Lack of registered tour guides
Lack of exposure of tour guides

Marketing

No branded marketable image at district level
Poor uncoordinated marketing and advertising
Brochures are not distributed appropriately

Demand

Visitor numbers are declining

Institutional Structure

Poor institutional organisation at district level
No coordination and lack of communication/synergy between private and public sector as well as the local Traditional Authorities
Limited
Lack of communication between local and district stakeholders
Lack of resources at municipal level: minimal tourism budget

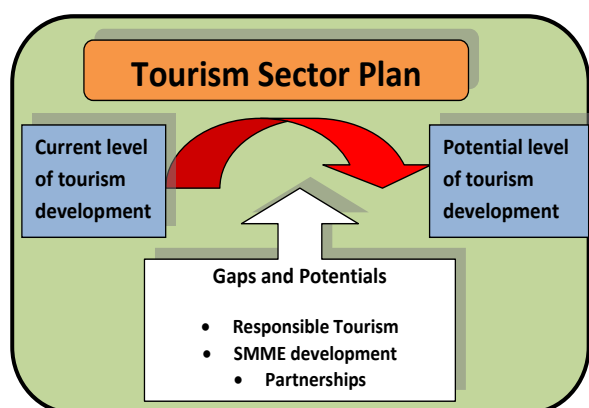
Threats

- Inadequate awareness of tourism among communities
- Political strife
- Crime
- Inflation

4 Tourism Sector Strategy Development Framework

The purpose of this phase is to provide direction to future tourism investment and areas of tourism which need attention. The Tourism Sector Strategy will be discussed first followed by the Implementation Framework. The tourism sector strategy addresses formulating tourism vision, goals and strategies informed by the previous situational analysis for uThukela DM as well as to recommend an appropriate institutional framework to manage tourism in the district with roles and responsibilities of the stakeholders. This is then followed by the Implementation Framework which entails developing an implementation plan that will highlight potential investment areas that the uThukela District Municipality needs to focus investment to ensure sustainable and responsible tourism development. These phases are discussed in further detail throughout this report.

The tourism sector strategy formulation comprises of phase three of the Review and Development of a Tourism Sector Strategy for uThukela District Municipality. This section consists of the formulation of a tourism vision, goals and strategies for uThukela DM. The strategies will then be broken down into implementable projects for implementation and thereafter prioritised according to specific priority principles. This phase is informed by conclusions drawn from the previous phases, the Situational and Contextual Analysis. The intention of this strategy is to provide a comprehensive over-arching framework that will guide uThukela District, and the local municipalities in developing sustainable tourism initiatives that promote greater economic development for the widest possible community. It will also facilitate tourism development initiatives, provide marketing directive, unlock latent tourism and economic development potential of the area, and come up with a number of tourism projects to be implemented, encourage private sector investment, and create economic development and sustainable job opportunities for the local urban and rural communities.



Objectives

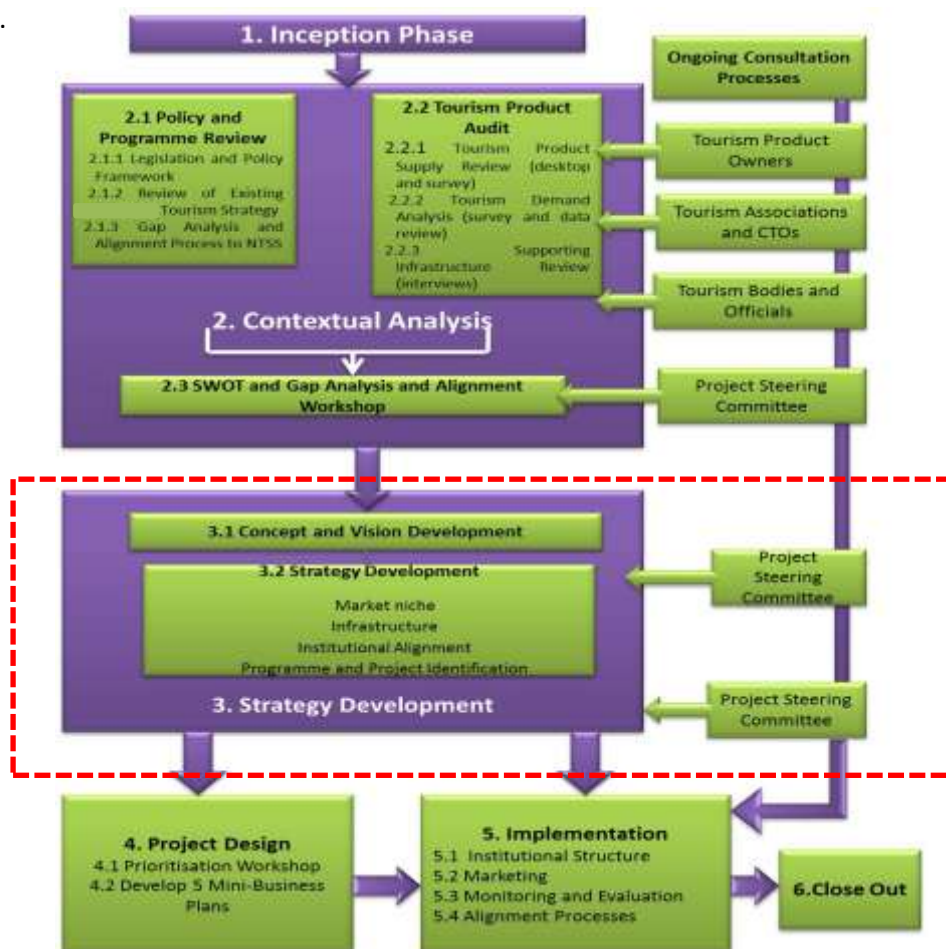
The objectives of this section are as follows:

- To formulate a detailed concept, vision, goals and strategies for tourism in uThukela aligned to relevant policy and national, provincial and district imperatives as well as issues identified in previous phases.
- To formulate a development and management plan as well as institutional structures relevant to achieving tourism growth in uThukela

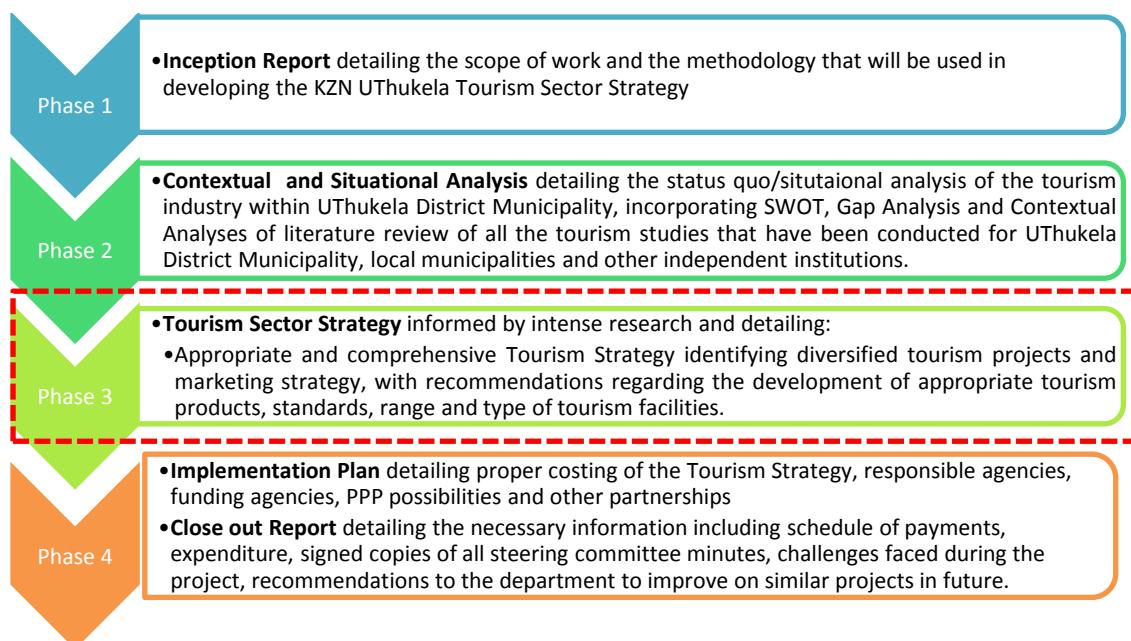
- To Identify and conceptualise suitable complementary products that could add value to the local tourism sector and projects linked to the strategies and aligned to issues identified.
- To formulate prioritisation principles for projects identified

Methodology, Process and Structure

The methodology adopted throughout the process of formulating the uThukela Tourism Development Strategy is outlined in the figure below. This process involves extensive consultation throughout the process through visionary workshops, stakeholder consultation, meetings. Public participation is an essential element of this project, during all phases of the work. To this end a series of interactions with product owners, via telephone and an online survey together with personal interviews has taken place. Community engagement has taken place as required by the client.



The figure below shows the process of the project and its different phases.



The structure of this section is as follows:



4.1 Overall Challenges

The major overall challenges which are addressed through and inform this strategic framework are as follows:

Overall Challenges

- Inaccurate, incomplete and lack of visitor statistics and inadequate knowledge management
- Lack of accommodation standards and grading
- Underdeveloped transport and ICT infrastructure and poor signage throughout the district
- Poor and uncoordinated marketing and advertising as well as inadequate distribution of marketing material and lack of district wide branding – lack of unified marketing and branding
- Weak institutional and organisational structures and lack of by-laws
- Poor communication and lack of synergy between public and private stakeholders
- Poor community tourism awareness, skills and involvement
- Lack of market research and development
- Cultural and heritage attractions not maintained
- Crime
- Lack of tour operators, local SMME development and transformation
- General decline in visitor numbers

Limited product development

Lack of integration and communication with key organisations and surrounding districts

Lack of community based initiatives and limited linkages with rural areas and communities

Limited range of facilities and activities

Environmental impact of new developments

Uneven tourism development (eg. Indaka)

Intervention areas and way forward taking into consideration the above challenges

Marketing – Experience driven tourism – expand on the brand of the district to local municipalities

Institutional Capacitating and staffing

Tourism Economic Infrastructure provision/upgrading/maintenance

Route Development and Signage

Tourism Information Centres

Empowering tourism stakeholders

Monitoring and Evaluation data + undertake research and development + tourism statistics and information

Municipal Entity

Upgrading of tourism channels (ICT)

Product Development of niche tourism and enhance existing attractions + tourism Grading

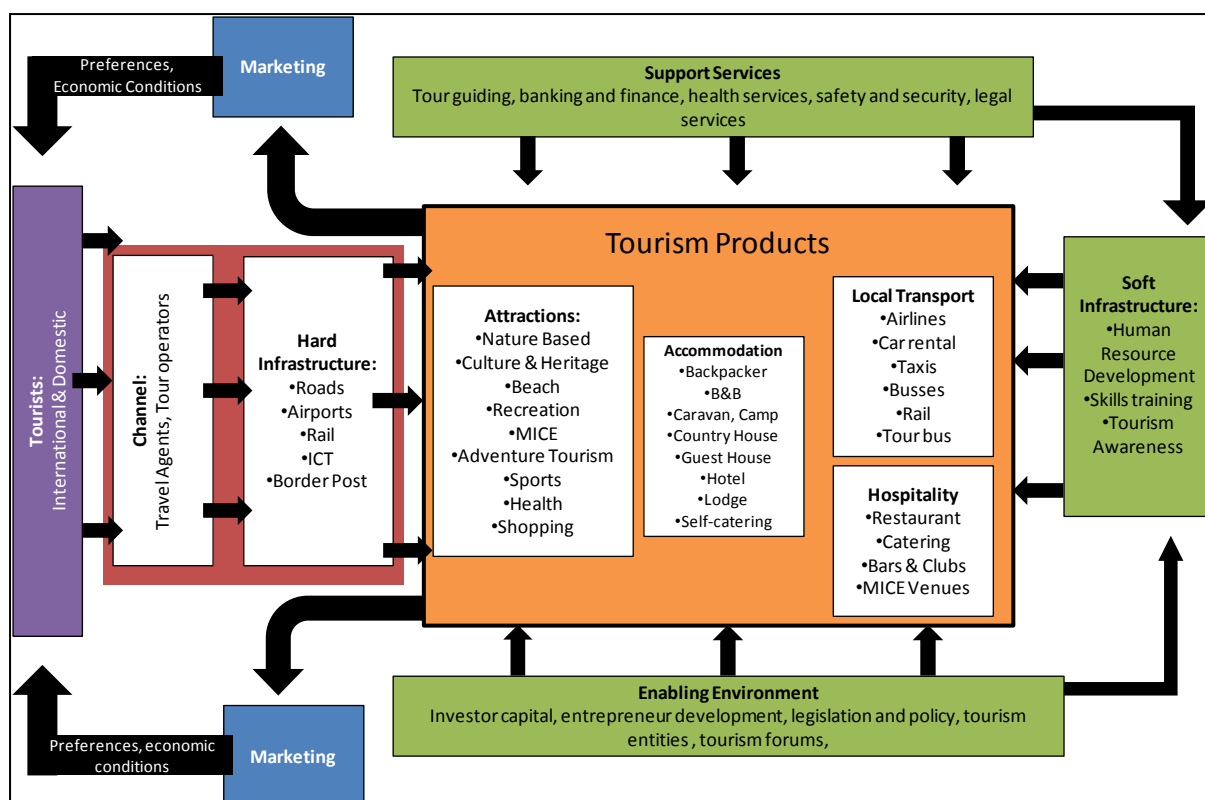
Create relationships with the MDRF, N3 Gateway and Open Africa

4.2 Tourism Approach and Principles

4.2.1 Strategizing through the Tourism System

The tourism industry represents the group of products and services provided to the tourist. It is important to recognise that the tourism industry needs to act as a system in order to function properly. Tourism development within the district therefore needs to create forward and backward linkages between the tourism products and other tourism products, and between tourism products and supporting services. All elements of the system need to be in place for the tourism sector in KZN to operate as a whole.

The previous phases identified the challenges and opportunities with regard to the aspects of the ‘tourism system’ as illustrated below. The current phase will provide a directive as to how to tackle the issues identified and fill the missing gaps.



4.2.2 Linking tourism strategic planning with Local Economic Development

Tourism is seen as a key economic sector in uThukela. Linking tourism development with Local Economic Development (LED) is key to ensuring that the benefits local tourism development accrues to the local economy, rather than being lost through leakages to other economies. As much as possible, the tourism system in uThukela as outlined above should be provided by the local economy to ensure maximisation of local benefits, and minimal leakages. The following strategy ensures alignment with local economic development.

4.2.3 Linking tourism Demand with tourism development

A key principle for tourism development is that it needs to be **demand** driven, rather than supply driven. Tourism demand refers to the requirements and expectations that tourists have from a particular destination and these requirements and expectations can be created by various push and pull factors. The key principal here is that tourism products in the local and district municipalities' should only be developed if there is a current demand for that product, *or* a strong likelihood that there will be future demand for that product.

4.2.4 Private Sector Driven, Government Facilitated

Tourism development should be private sector driven, with government facilitating this through the creation of an enabling environment through policies, strategies, infrastructure provision etc. In particular the government role is largely around the provision of supportive infrastructure to uThukela to ensure the sustainability of tourism development in the locality.

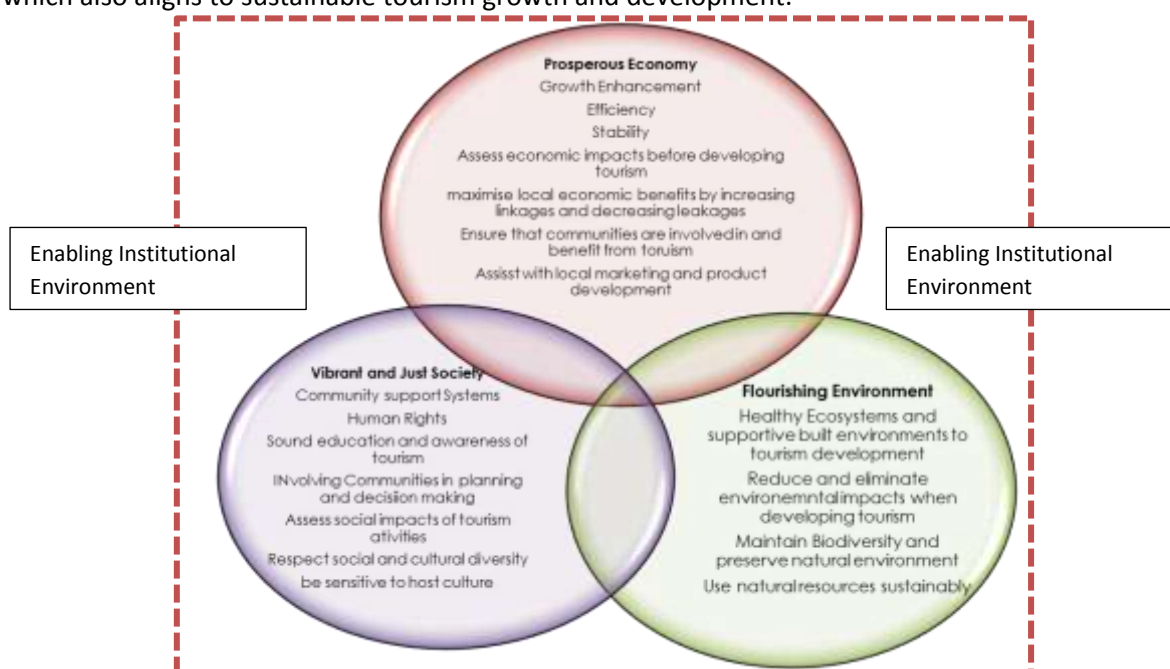
4.2.5 Sustainable and Responsible Tourism Growth and Development in uThukela

This study will consider the development of tourism within the uThukela DM, not in the narrow sense that it should be economically viable, but using the following definition of sustainable tourism development from the United Nations Environment Programme (UNEP) as follows:

- "1) Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.*
- 2) Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.*
- 3) Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation."*

As such, sustainable tourism development seeks to *"Meeting the needs of the present without compromising the ability of the future generations to meet their own needs Bruntland Report, 1987"*. Sustainable tourism development is essential for tourism planning in uThukela DM. As seen from the previous phases, nature based tourism is a core experience as per the KZN Tourism Master Plan and is dominant in uThukela, due to the many attractions which are protected and managed by Ezemvelo KZN Wildlife and the Drakensberg and UKhahlamba – Drakensberg World Heritage Site. Given the inherent significance of the natural environment and the need to create employment and enhance skills, and create supportive built environments, sustainable tourism development is a high priority.

Responsible tourism is a type of tourism which is strongly advocated by government and tourism planners. Tourists increasingly want to know that the tourist activities that they are engaging in are responsible in nature. The three pillars to responsible tourism are shown in the following diagram which also aligns to sustainable tourism growth and development.



These principles as indicated through the diagram above promote tourism development that ensures benefits to the local community, reduces poverty and suggests ways to minimize the negative impacts of tourism on the environment. Furthermore, tourists increasingly tend to be attracted to areas that show components of responsible or sustainable tourism practices. Responsible tourism is therefore tourism development that avoids any damage to the environment, culture and economy of the area where it takes place. This strategic framework therefore aligns to these principles.

4.2.6 Tourism Clustering

The clustering of tourism attractions is key to developing a competitive advantage through the following;

- Sharing of public infrastructure and resources
- **Linkages in marketing**
- Linkages with independent products adding value to the whole

Where possible, this study will look to develop tourism products in the district and activity clusters and corridors to increase the viability and attractiveness of the district as a whole. This is particularly relevant to uThukela as many of the key activities already developed are focussed on specific Historical Sites, Sporting Arenas or at specific Nature Reserves and Dams, and there is a need to densify tourism offerings based on patterns as well as create opportunities to grow new clusters. Clustering tourism can also be seen in the sense of clustering of existing products in order to market as a whole or collectively. This is imperative in the case of uThukela as smaller businesses can benefit from this time of marketing.

4.2.7 Tourism Competitive and Comparative Advantage

This study will be based on the development of tourism in the district based on the specific advantages that the tourism product would have in that area, over another area.

Opportunity areas have a unique selling point that will generate enough demand for that product by tourists in order for them to travel to the towns within uThukela. UThukela is fortunate to have a variety of tourist experiences suiting various incentives and personalities. This can be seen as an opportunity for the district as a whole.

Other economic principles applied in the tourism development context include:

- Maximise the use of existing resources
- Public Private Partnerships
- Local community empowerment
- Creation of an enabling environment
- Creation of favourable locational factors and improving the investment climate
- Broaden Economic Base
- Promoting SMME's and Local Businesses
- Business Linkages

It is through the above mentioned approach and principles that the uThukela District Tourism Sector Strategy is developed. The next section will provide a draft summary tourism vision and strategic framework.

4.3 uThukela Tourism Vision 2012

This section provides a draft tourism vision for uThukela District. The vision statement is informed by the major challenges discovered through the situational analysis. A tourism vision statement outlines what the tourism industry in uThukela wants to be, or how it wants the world in which it operates to be. It is a long-term view. An alignment needs to be made with the national and provincial visions as well as the district IDP vision and mandate. A recap of the vision statements are provided to align the district tourism vision with.

4.3.1 NTSS Development Vision

'To be a top 20 tourism destination in the world by 2020'.

4.3.2 KZN Tourism Master Plan Vision and Mission

By 2020 Kwazulu-Natal will be:

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

4.3.3 UThukela IDP Development Vision 2012

'An improved quality of life for all in a globally interconnected, stable and developed region'.

4.3.4 Previous Tourism Vision and Mission

Vision

UThukela District will become a preferred tourist destination that is characterised by good investments, booming economy, thriving communities, environmentally friendliness, and good management.

Mission

"To promote tourism development by:

- *investing in infrastructure;*
- *creating an enabling environment for economic development;*
- *creating an environment that is socially acceptable;*
- *promoting sustainable development; and*
- *putting in place proper management structures*

"For the prosperity of the district and its inhabitants"

4.3.5 UThukela Tourism Vision 2012

Taking into account the above visions, uThukela needs to align to the National and provincial visions in order to contribute to and achieve the aims of tourism at a national and provincial level. The draft vision in alignment is therefore:

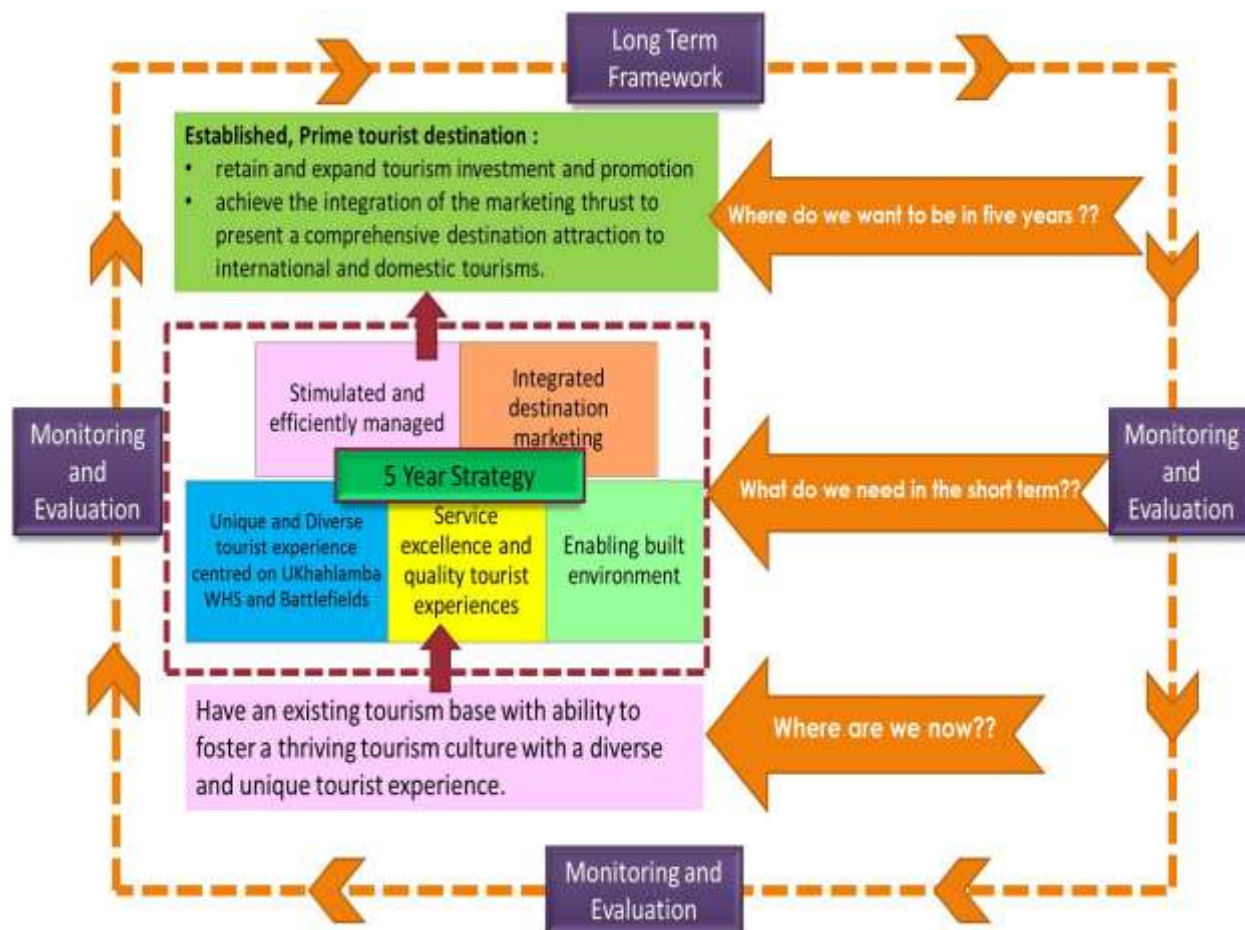
'In the next five years, uThukela will be a prime tourist destination offering a unique and diverse tourism experience anchored by the uKhahlamba - Drakensberg World Heritage Site and Battlefields with an increased domestic and foreign visitor base, linked to surrounding tourism attractions to actively contribute to the 2020 vision targets of the National Tourism Sector Strategy and KZN Tourism Master Plan.

This will be achieved by nurturing holistic and responsible tourism development which stimulates job creation with a well-resourced and efficiently managed and transformed tourism sector through an integrated destination marketing mechanism'.

The vision statement sums up the needs to nurture sustainable and responsible tourism growth and development and takes into account the approach described above. Key the vision is the fact that uThukela already has a visitor base, which needs to be enhanced through efficient and collective marketing to target market segments. The two anchor attractions are the Drakensberg and Battlefields. However, there is a varied tourism experience through the niche experiences found, such as business tourism, avi-tourism, adventure tourism, arts and craft tourism etc. which adds to the strength of current tourism in uThukela. There are however many challenges which affect tourism negatively, that is the uncoordinated and fragmented communication between stakeholders and the weak institutional structure, which affects the marketing of the district with many duplicated efforts. Given this main challenge which affects the functioning of tourism, the main aim is:

Main Strategic Thrust/Aim: to achieve the integration of the marketing thrust to present a comprehensive destination attraction to international and domestic tourists.

The diagramme below is an illustration of the vision and what is hoped to be achieved in the short and long term.



The objectives as indicated by the strategy are discussed below:

- Efficiently managed and transformed tourism sector and integrated destination marketing:**
 A core thrust that uThukela needs is a strong and united tourism marketing action integrating the diverse attractions and experiences into a unified message aimed at attracting domestic and international tourists. In order to achieve this unified approach to the marketing of the district a **strong, unified and integrated institutional and organisational structure is required.**

The institutional structure therefore provides the main thrust of the strategy and forms Strategic Cluster/Goal 5 discussed below to address the fragmented functioning of the stakeholders collectively to avoid duplication of efforts and to market and promote uThukela and what it has to offer and not individual experiences and products. There should be equality and just tourism operation where every tourism stakeholder receives equal attention, exposure and recognition.

One of the main challenges is that there is limited coordination at the district level. Limited coordination relates to both institutional arrangements and with regard to tourism development and marketing as well as regulation. There is limited coordination at district level to pool resources, initiatives and role players together. Stakeholders need to work in

synergy to achieve integrated and strong tourism linkages and growth and development. Therefore the core aim of the strategy aims to synergise and coordinate tourism growth and development in uThukela in order to realise full potential and be inclusive. This main theme couples with all other aspects of the tourism system need to work hand in hand to achieve a sustained tourism environment for present and future generations.

This pillar also focusses on transformation to become inclusive and fully representative of all people, mainly previously disadvantaged to benefit from and actively participate in tourism in uThukela DM.

- Unique and diverse tourism experience anchored by the Drakensberg and Battlefields:** uThukela DM has proved to retain a variety and diverse mix of tourism products which need to be synergised to reach full potential. UThukela is rich in tourist attractions, and has a world renowned attraction lying at its doorstep with intense history and a defined culture (Drakensberg and Battlefields) providing an anchor for the promotion of other experiences offered in the district. UThukela has good infrastructure leading to the district which increases accessibility and flow of traffic through the region. There are also a number of important cross boundary linkages and marketing with N3 Gateway, Amajuba, UMzinyathi, Midlands Meander, Maloti-Drakensberg Route, Van Reenen etc. which need to be fostered and explored to achieve a strengthened tourist system.

Needless to say, tourism needs key anchors which uThukela is fortunate to have, that is in reference to the nature based UKhahlamba-Drakensberg World Heritage Site and cultural and heritage based Battlefields. With this in place marketing the diverse and unique mix of tourism, anchored on these attractions but expose all possibilities to suit the different target market segments.

UThukela has proven to already consist of a diverse and unique mix of tourism products and activity, however there is inadequate integration of the tourism experiences, marketing coordination and communication between the district municipality, the five local municipalities, communities, traditional authorities and most importantly, private sector. Private sector plays the central role as these are the main service and product providers amalgamating in C.T.Os. This needs to be synergised to However; they cannot function effectively without support and infrastructure from the municipality. The municipality in turn also relies on private property for revenue and upholding a perception of tourism in uThukela. This in turn needs to be regulated by the municipality to ensure focussed and quality service excellence. Communities and traditional authorities need to be involved in tourism as well as an integral part of the process as tourism is seen as an economic driver and income generator.

- Job Creation and SMME development:** Since uThukela has an inherent tourism character, this industry has the potential to develop communities and act as an income generator as well as uplift and educate communities. UThukela is characterised by low literacy rates and low skills levels and general underdevelopment and the tourism industry aims to contribute to a sustained imperative to uplift communities and create opportunities.
- United and intrinsically linked:** The aim is to integrate tourism in uThukela with surrounding districts (Amajuba UMgungundlovu etc.), countries (Lesotho) and other provinces such as Free State through communication mechanisms with the appropriate tourism associations and bodies. Tourism in uThukela as seen through the situational analysis consists of various other role players such as Ezemvelo KZN Wildlife, N3 Gateway and Open Africa, Battlefields route association Amafa, Maloti Drakensberg Route Forum etc. These associations aid with

linking uThukela with surrounding districts and countries which are needed to integrate all these regions. Integration of surrounding regions is crucial as tourism cannot function by itself and can strengthen and be strengthened by thriving surrounding tourism destinations. Integration will also be an effective marketing tool and tool for exposure which will increase the amount of visitor numbers.

- **Responsible tourism:** As described above responsible tourism incorporates the spheres of sustainable tourism and is imperative for uThukela to take into consideration and incorporate into the strategy. UThukela has a social, environmental and economic responsibility which needs to continuously be respected and adhered to. The vision is holistic in the sense that it covers all aspects of responsible and sustainable tourism. It addresses a prosperous economy, vibrant and just society and a flourishing environment by creating awareness, engaging participation and communication, respecting culture and diversity, reducing environmental impacts, maintaining biodiversity and maximising local economic benefits.

This vision is a five year achievable vision, achievable if all parties come together and split tasks and all stakeholders are actively involved in the process. This vision can be seen to be both a long term and short term vision as the imperatives will continue after the five year period. The strategy therefore works in the same way. It is a short term strategy which aims to have a long term impact and continuation. It is important to note that not all projects are implementable within the next five years, as there are also long term projects and many things that have to happen before others. Given this and the fact that financial constraints do not allow for all projects to be implemented in the short term, the strategy is twofold in terms of timeframe.

4.4 Tourism Goals and Strategies

The tourism goals and strategies that have been formulated according to the issues, constraints and challenges found in the previous phase are provided in the table below and are discussed in further detail afterward. These strategies and goals are directly in line with the KZN Tourism Master Plan.

Strategic Cluster/Goal	Strategic Thrust	
Strategic Cluster/ Goal 1: Marketing-Develop an effective and efficient marketing system to increase visitor numbers into uThukela Marketing - tourism growth and development (demand)	Strategy 1.1:	Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution
	Strategy 1.2:	Ensuring route development, branding and marketing cohesion
Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion	Strategy 2.1:	Develop and Enhance Core nature based tourist experience aligned with KZN Tourism Master Plan (iconic natural scenic tourism experiences)
	Strategy 2.2:	Develop Niche Tourism Experiences to contribute to a diverse and unique tourist experience
	Strategy 2.3:	Enhance Tour Operating services, hospitality and accommodation to support the uThukela tourism industry
	Strategy 2.4:	Ensure Investment promotion of tourism in uThukela
	Strategy 2.5:	Enhance safety and security in the district to support crime free tourism in uThukela
	Strategy 2.6:	Promote and Accommodate Accessible tourism
Strategic Cluster/Goal 3: People Development- To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence.	Strategy 3.1:	Encourage and ensure transformation of the uThukela tourism industry
	Strategy 3.2:	Stimulate a tourism culture through tourism awareness and education across the district
	Strategy 3.3:	Ensure Quality Tourist Experiences and service excellence
Strategic Cluster/Goal 4: Tourism Infrastructure Investment Framework-To create a favourable built tourism environment to become conducive to growth and development and to boost investor confidence	Strategy 4.1:	Maintain and upgrade Transport (road, air and rail), communication and Services infrastructure to create a conducive tourism environment
	Strategy 4.2:	Maintain and facilitate provision of Signage to direct visitors in and around uThukela
Strategic Cluster/Goal 5: Policy, strategy, governance, research & knowledge management monitoring and evaluation- To create an enabling institutional environment through knowledge management, developing collaborative partnerships and producing planning and regulatory measures	Strategy 5.1:	Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry
	Strategy 5.2:	Enhance tourism through institutional arrangements, collaborative partnerships, communication and policy
	Strategy 5.3:	Promote responsible tourism and green principles in tourism development
	Strategy 5.4:	Provide a sustainable Planning framework to guide future tourism development and investment

4.4.1 Strategic Cluster/Goal 1: Marketing – To Develop an effective and efficient marketing system to increase visitor numbers into uThukela

As seen through the situational analysis one of the key challenges and threats facing tourism in uThukela is the weak marketing system or general lack of a system to regulate and coordinate marketing initiatives. Marketing efforts are uncoordinated and individual service providers undertake to market their own services. Some municipalities such as Imbabazane and Emnambithi have undertaken the advantage offered by organizations such as Open Africa and N3 Gateway to market themselves and what the regions have to offer. Even though some LMs have brochures, these are not well distributed. Brochure management agencies from outside uThukela aid with marketing. Therefore it can be summed that marketing is unequal and done ad hoc. UThukela needs to be marketed as a district and intrinsically linked to surrounding regions to strengthen the image and exposure. Marketing is a major function of a C.T.O, uThukela has only two C.T.Os and no R.T.O, therefore is institutionally weak with regard to marketing. This indicates the importance of institutional arrangements which will be dealt with through the institutional framework. UThukela needs to align and communicate with TKZN and South African tourism as these are key marketing bodies in KZN and S.A. the strategies under this thrust are discussed below followed by a **detailed list of potential projects are listed at the end of this section.**

Strategy 1.1: Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution

As mentioned general marketing is poor with inadequate distribution efforts. Often brochures are developed and sit in boxes and do not get distributed which indicates a need for a distribution plan to coordinate and provide direction for ways of distributing marketing material. Also, a more varied form of marketing needs to take place with more role-players involved. This strategy hopes to achieve these aspects to bridge the gap of inefficient marketing. It is not very effective to only hand out information when a visitor is in the district, we need to work to get people into the district through effective marketing and then also provide information to them about. There is a need for a district website and other places of advertising such as television, travel magazines etc. Marketing should ideally promote and market uThukela's varied experiences and tourism activities e.g. wedding destinations, culture, nature based, rural, adventure, arts and craft tourism, MICE tourism etc. market and brand varied tourism experiences using existing draw cards such as Ladysmith Black Mambazo, Drakensberg, Battlefields and Drakensberg Boys Choir to interest people in the district. It is important to note that communities and local business should also be involved in marketing and advertising. Tourism experiences are not packaged and are seen as an intervention in this strategy. Tourism Information centres is a key marketing tool incorporated in this strategy and there needs to be a tourism office in every LM. Tourism offices need to be fully equipped, presentable and creative. A key project to be noted is a proposed Thokozani type development acting as an information office with a cluster of services, such as a restaurant, craft shops etc. which is a successful development whereby people book holidays and enquire about tourism in the area of Okhahlamba. More of this type development is needed in uThukela to effectively expose the region. Events are a major draw card to the district and this needs to be enhanced and coordinated through an events calendar and strategy.

Strategy 1.2: Ensuring route development, branding and marketing cohesion

The aim of this strategy is to create a synergy and good working relationship with the major marketing bodies and create a comprehensive marketing strategy as well as to foster route development as a major marketing tool and draw card. There is limited branding and brandable image of the district which this strategy also addresses. The marketing strategy will take this into account however, it is important enough to be mentioned as a standalone project to place emphasis on its importance. A district brand needs to be enforced and all tourism services and product need

to belong to and use this form of branding on all marketing material. Route development is a prime source of marketing and stimulates economic development. Route development can 'offer a promising potential vehicle for local economic development in many small towns and rural areas of South Africa. The clustering of activities and attractions through the development of tourism routes potentially can stimulate cooperation and partnerships as well as catalysing entrepreneurial opportunities'. Taking this into account route development is a key tool for marketing and local economic development. It is important to note that a proper definition of route development needs to be decided on. There seems to be confusion of a tourism route and tourism corridor. For purposed of this strategy a route is both an amalgamation of marketing bodies and stakeholders defined geographically as well as defined physical sub routes with attractions. An example to follow are the initiatives of N3 Gateway and Open Africa with whom uThukela need to partner with. An example of the varied market image which uThukela is recommended to have is illustrated below:



Marketing Guidelines

In conclusion, marketing is underpinned by the need to grow demand. It should also align to provincial and national marketing brands.

The primary marketing objective of the marketing strategy is to increase visitor numbers to KZN. The marketing strategy is underpinned by the need to grow demand through aligned and integrated provincial tourism branding and positioning. It is recommended by the KZN Tourism Master Plan that the branding extends to all products and services originating within the province to perpetually re-enforce the provincial brand. The primary direction used for marketing brand alignment is to revive experiential branding rather than generic destination and geographical branding. Experiential Core experiences are defined by the KZN Tourism Master Plan as:

- Beach
- **Scenic/natural beauty/mountains:** this is seen to be of core importance to tourism in KZN. '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. This is of

relevance to uThukela due to the UKhahlamba Drakensberg World heritage Site consisting of these core experiences.

- Wildlife

Secondary core experiences identified by the KZN Tourism Master Plan are the niche tourism areas which consist of:

- Culture/heritage (also underpins all core experiences/making them unique) Zulu, San, Indian, Struggle, Missions, Battlefields. "Heritage" per se is not the marketing or brand name to be used. Niche heritage products will each have their own "brand" names, and these would also be used within the core experiences as add-ons
- Adventure
- Business Tourism (MICE) & Events
- Avi-tourism or Birding
- Cruise tourism
- Hunting
- Rail tourism
- Diving
- Health/Medical
- Pink Tourism
- Agri-tourism
- Shopping

The KZN Tourism Master Plan also recommends that all future marketing material should be experience led and include the provincial brand and optionally include a geographic designation, which can be a local logo or brand. The KZN Tourism Master Plan proposes a new experience based market segmentation and aligns a marketing budget to each. This however, has yet to be developed further and is therefore not used in this strategy as yet.

The agreed provincial branding within the framework of the national brand is. This brand should be used for all marketing material. The use of experience specific tag lines will enhance the destination brands and the new brand. An example of how the layout should include the brand and the use of experience specific tags.



Zulu Kingdom. *Exceptional*

Alignment to UThukela District Tourism Strategy

In keeping with the Provincial rationale and mandate for marketing, uThukela DM strategy needs to be underpinned by the key object of marketing which is to grow visitor numbers. With regard to the brand alignment, all products, marketing material need to demonstrate the new provincial brand. The marketing strategy is focussed on Core experiences rather than destination marketing, with 'scenic/natural beauty /mountains being a core experience as defined in the Master Plan, this experience which is offered by uThukela needs to be marketed accordingly. UThukela also consists of the secondary core experiences which falls under niche tourism such as culture/heritage. A focus lies in experiences not destinations, therefore the uThukela strategy should align to focus on the varied experiences created by the key attractions of the Battlefields and the UKhahlamba Drakensberg World Heritage Site which include adventure, business and avi-tourism.

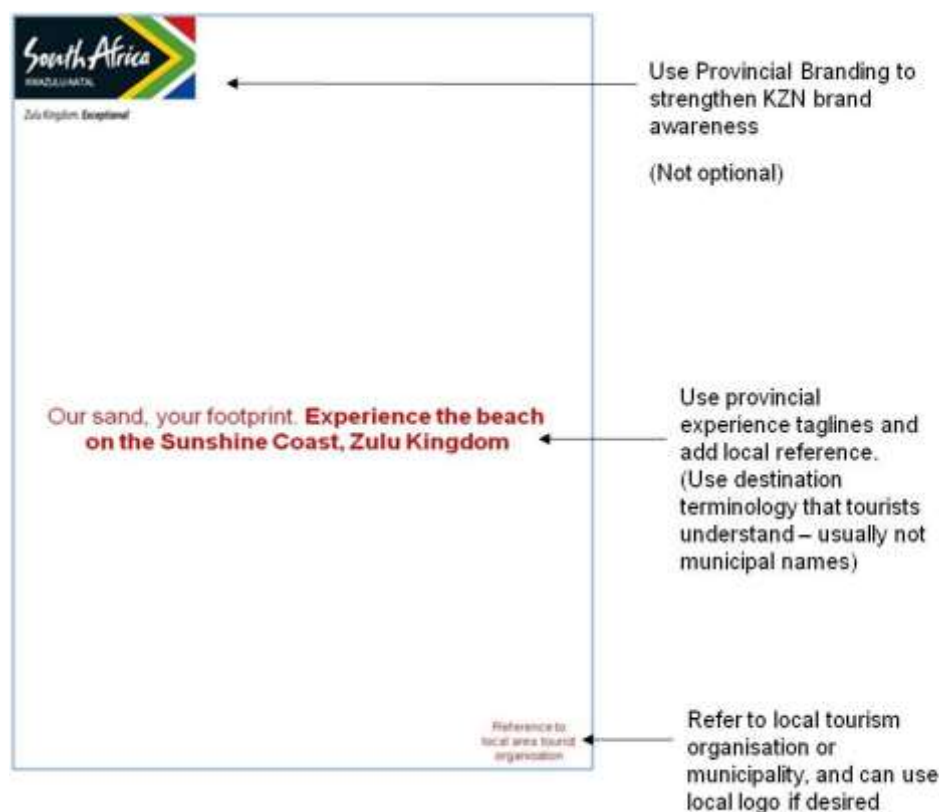


Figure 37 - Example of layout and use of branding and experience specific tags (Source: KZN Tourism Master Plan 2011, Executive Summary)

The **Marketing role of district/local municipalities** is limited largely to tourism information provision within the framework of the provincial experience led marketing and the provincial branding; there should be no, or limited separate tourism branding activities. It is important for the District and local municipalities to understand their role on Marketing. Institutions involved in marketing are tabulated below to provide an overview of the key marketing bodies in South Africa and KwaZulu-Natal.

N.B. The KZN Tourism Master Plan 2011 states that, there should be 'No generic marketing of geographical areas as tourists destinations'. That is, Marketing/selling is to be focused on what is bought by tourists and not where it is bought. i.e collateral will be experience based, followed by geography. UThukela District and the local municipalities need to align to this form of marketing. Also, the district would need to market according to the demand related market segments identified. The Master plan also spells out the various types of marketing for the various market segments.

Institutions involved in marketing in South Africa and KwaZulu-Natal	
South African Tourism	Tourism Kwazulu-Natal
A key tourism institution on a national level is SA Tourism, broadly tasked with marketing of the country both abroad and domestically to stimulate the tourism sector to contribute to economic growth. Its mission is as per the following; "Facilitate the strategic alignment of the provinces	The activities of TKZN is directed and guided by the KwaZulu-Natal Tourism Act of 1996 (amended in 2002). This Act vests responsibility for the development, promotion and marketing of tourism in the province to TKZN. The workings of the public entity are therefore outlined in the sections below when the KZN Tourism Act that established the entity

and industry in support of the global marketing of tourism to South Africa; Remove all obstacles to tourism growth; Build a tourist-friendly nation; and Ensure that tourism benefits all South Africans” (www.southafrica.net).

Its role is therefore more than being solely focused on marketing and the institution provides information and research on the sector to all components of the trade market. They also provide statistics on the sector’s performance, country reports and market segmentation reports as well as many others. As such, it is an important institutional resource for the country’s tourism sector.

is discussed. Furthermore, it is important here to note that the majority of policy and institutional directives for tourism in the province emanates from TKZN, and most of this section of the report will therefore focus on TKZN policies and strategies.

TKZN functions:

Some of the functions of TKZN are as follows:

- Ensure responsible tourism development, marketing and promotion of tourism products within the province and in municipal areas;
- Ensure the implementation of National and Provincial tourism policies;
- Promote the integration of marketing and development of the tourism industry within the province

Ensure that tourism operators and tourism establishments are adhering to the provincial policies and legislation.

Marketing Interventions/Projects

The proposed projects for this section are listed in the following page.

Strategy 1.1	Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution	Strategy 1.2	Ensuring Branding and Marketing cohesion
1.1.1	Formulate a distribution strategy to ensure distribution of marketing material to areas of importance and key exposure (airports, service stations, convention centres, businesses etc.)	1.2.1	Develop a district marketing strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars
1.1.2	Create an Events Calendar and strategy for District and coordinate and lobby the use of local SMMEs to deliver for events	1.2.2	Create partnerships and become a member of N3 Gateway and Open Africa to create an integrated and linked form of marketing and relationship with surrounding destinations
1.1.3	Develop a district magazine with adverts of all attractions and service providers	1.2.3	Develop the N11 as a route integrated with Amajuba
1.1.4	Appoint service provider to develop a district tourism website with a data base of all attractions, and products as well as potential investments	1.2.4	Promote Bushman's experience route in partnership with Open Africa
1.1.5	Ensure that Indaka, Imbabazane, have information kiosks/offices with designated information officers	1.2.5	Develop Nguni Route development along N11 with Open Africa
1.1.6	Ensure that information offices are in appealing condition to attract visitors	1.2.6	Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela
1.1.7	Strengthen/Create relationships with international outbound tour operators that handle the Southern African destinations	1.2.7	Investigate the possibility of a religious route to be developed along Emnambithi, Van Reenen etc.
1.1.8	Information distribution to be provided at attractions and through service providers	1.2.8	Promote the brand for the district 'the Soul of the Zulu Kingdom' and ensure alignment by all affiliated with the district and enforce brand alignment and usage on all marketing material
1.1.9	Engage communities in marketing initiatives at service stations, local businesses etc.	1.2.10	Create themed Route Development along R74 and R103 in line with proposed district route plan
1.1.10	Area marketing project through packaging of experiences for travel agents and other marketing databases (eg. Gift ideas see www.giftday.co.za)	1.2.11	Engage experience based marketing to cover all attractions- Market and brand Drakensberg, battlefields and other attractions to work in synergy
1.1.11	Ensure alignment with demand through constant research on market segments needs and trends and market accordingly by considering varied marketing tools in line with the KZN Tourism Master plan (e.g. ICT) both on an international and national scale	1.2.12	Provide support to the Cannalibism route in Indaka and investigate linkages to UMTshezi and UMzinyathi
1.1.12	Package tourism targeted at the niche tourism sectors in relation to core experiences	1.2.13	Facilitate the creation of a RTO to handle marketing as a primary function amongst other functions
1.1.13	Encourage participation in film and other festivals both nationally and internationally	1.2.14	Formulate a strategy to market the district throughout S.A and internationally through trade shows, road shows, various media, conferences etc.
1.1.14	Introduce social networking and ICT as tools for marketing	1.2.15	Identify alternative marketing tools to be developed through a marketing strategy which is demand and supply driven
1.1.15	Coordinate additional events in support of Music and other festivals	1.2.16	Facilitate the joint and cross promotional marketing of district as a whole in conjunction with all stakeholders (TKZN, South Africa Tourism private, public etc.)
1.1.16	Provide support and recognise events as a form of exposure	1.2.17	Limit branding and synergise with macro brands
1.1.17	Ensure constant updating of brochure and continued market research and documentation of history and culture of the district as a whole and what it has to offer	1.2.18	Investigate the Twinta Trail as an opportunity for route development in Okhahlamba LM
1.1.18	Ensure participation through Indaba, by designated stand and advertising as part of TKZN and N3 gateway, Open Africa stand		
1.1.19	Promote visibility through marketing tools such as influential travel magazines (eg. Country life, WWW)		

4.4.2 Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion

This strategic cluster relates to a product development and support services framework. This strategic cluster and goal aims to improve the perception of the tourism industry in uThukela. Since it is seen from available statistics that visitor numbers are declining, one of the reasons could be that the perception of the area is not 'up-to-standard'. Also, accessible tourism is not seen as a main theme or consideration that comes through strongly in the district therefore this is identified through the strategies within this goal as discussed below.

Tourism products and product development relates to tourist attractions, accommodation hospitality and can include tour operators. UThukela has a number of product developments, but is lacking new innovative ideas and inclusion of rural and township tourism as well as community based tourism. Existing attractions and established markets should not be ignored and should be strengthened and seen as opportunities to grow as they are established and can draw in more visitors and expose other attractions. UThukela DM has the potential to add to and improve on these. Therefore product development is essential in create draw cards and enticing people to visit uThukela and in this case provide a diverse experience centred on the main tourism attraction anchors, the Drakensberg and Battlefields. Tourism products are the focal point of tourism and are-through adequate marketing- the drawing card for tourism activity. Tourism products therefore determine the strength of the tourism system, making it imperative for much emphasis to be placed those in uThukela. It is necessary to focus on the strengths of the existing tourism attractions, so as not to lose the existing market. In addition, the Strategy aims to draw in new market segments via investment.

Tourism products are concentrated in the berg and battle sites. This needs to extend to incorporate the existing other nice attractions and create a synergy between all types of attractions. In keeping with the KZN Tourism Master Plan, core experiences need to be developed as a priority which relates to the Drakensberg World Heritage Site. This however does not mean that other attractions are ignored, as mentioned they have to work together to fortify the tourist experience. In the case of uThukela, the strategy therefore looks toward providing a holistic tourism experience to suit the needs of different market segments.

The tourism Product Development Framework aligns with core tourism experiences and priority niche experiences as indicated in the Marketing section above.

Strategy 2.1: Develop and Enhance Core nature based tourist experience aligned with KZN Tourism Master Plan (iconic natural scenic tourism experiences)

This strategy relates to capitalising on nature based and eco - tourism and iconic scenic experiences through the Drakensberg and Drakensberg World Heritage Site in addition to the natural scenic landscape of uThukela to lure in visitors. This strategy is developed to align to the Master Plan and in keeping with the current initiatives that are underway or at a concept stage. Such projects are planned nature reserves on communal land administered by two Amakhosi in Northern Drakensberg. Potential linkages which are important for cross boundary integration include the Maloti-Drakensberg Route and proposed trekking route. Other potential initiatives include Ngelegele Community Game Reserve, expanding Weenen Game Reserve to accommodation consolidated community land, restoration of Umsuluzi Game Reserve near Colenso etc.

Nature based products are utilized and promoted in a responsible and sustainable manner which protects the natural environment and aims to preserve it and not allow encroachments onto

sensitive land. Nature based tourism is where people travel to a specific area due to its particular natural features. A large category under this type of tourism is game parks or nature reserves. It also includes other botanical, geographical or similar features. UThukela has many of these features as seen through the situational analysis which has a number of famous nature reserves such as the Spieonkop Game Reserve, Nambiti Game Reserve, Weenen Reserve etc.

Eco-tourism is environmentally and socially responsible travel to natural or near natural areas that promotes conservation, has low visual impact and provides for beneficially active socio-economic involvement of local people. On a global scale, eco-tourism has grown faster than any other tourism sector, and it is expected to continue to do so for a number of years. Locally, eco-tourism must be incorporated into tourism planning and development, given the number of conservation areas.

Nature based tourism in UThukela one of the major draw cards. Nature based tourism is deemed a core experience through the KZN Tourism Master Plan and should therefore be mainstreamed. The main attraction with this regard is the UKhahlamba Drakensberg World Heritage site. Nature based tourism allows for conservation and eco-tourism (as well as green tourism) which contribute toward sustainable tourism development. This is important in order to sustain the natural environment for present and future generations. Sustainable tourism is prioritised at National and provincial level through the various legislation and policies as described in the contextual analysis above. It is important to note that sustainable tourism is not confined to the natural environment, but deals with the social implications and economic implications to the surrounding communities and therefore means integrating all three spheres to be taken into regard when making decisions and planning for developments. Nature based tourism relates to protection and appreciation of the ecosystems and biodiversity of environmentally sensitive areas. Hiking and nature based activities are also generated from these attractions. Nature Based tourism includes niche tourism experiences such as avi-tourism and adventure tourism.

Nature tourism is not only an important strategy for rural tourism, but for assisting in preserving the natural environment and pristine areas in rural areas where there is little to no land use management and much degradation such as the case of Indaka LM. Sustainable tourism in UThukela is only recently coming to grips with creating tourism that benefits the local communities. There is a need for communities to become involved and aware of tourism and the economic potential as well as the social responsibility. Nature based tourism includes niche tourism including avi-tourism and wildlife tourism. The benefits of managing natural assets sustainably include:

- At the national interest level, natural asset-targeted tourism impact management approaches will help South Africa maintain its competitive edge in “green tourism”;
- At a central governance level such approaches will help South Africa fulfil both international and national obligations and strategies; and
- At the industry operational level such approaches will help ensure that the South Africa tourism industry remains profitable and can expand in a sustainable manner.

At the local government level such approaches will:

- Assist councils in meeting quadruple-bottom-line (environment, social, economic, cultural) reporting objectives
- Assist councils in meeting the sustainable development requirements of the as stipulated in the White Paper on Local Government (1998)
- Reduce the likelihood of litigation, costly remediation and other reactive measures that tie up valuable council resources
- Send pro-active leadership and guidance signals from local government to the various tourism sector groups in South Africa

- Provide a sharper focus for councils in the management of both tourism and recreational activities in the their districts and regions

The projects under this strategy are listed at the end of this section.

Strategy 2.2: Develop Niche Tourism Experiences to contribute to a diverse and unique tourist experience

This is important, in keeping with the national focus of the development of niche tourism products. According to the KZN Master Plan, nice tourism experiences include,

- **Culture/heritage tourism:** This type of tourism is where the products and services that are of interest to the visitor reflect the customs, traditions, heritage, history and way of life of the local residents of the area. As such, it is one of the most important facets of community based tourism. Culture and heritage tourism is of grave importance to uThukela as it is famous for the Battlefields and various religious sites, san and bushman paintings etc. The most renowned attraction is the Battlefields which is seen as one of the major draw cards in uThukela following the Drakensberg World Heritage Site. It is recommended that this feature is to be used as an anchor together with the Drakensberg to act as a draw card and entice people with the varied support tourist niche attractions. In order for the cultural and heritage tourism to be a draw card, sites need to be maintained and proper signage erected as well as adequate marketing is needed.
- **Community Based tourism:** A focus on community tourism is one way in which responsible tourism can be achieved. Furthermore, given the demographic characteristics of uThukela, community tourism is an important focus due to its developmental benefits. Community based tourism is important for tourism in uThukela to be inclusive and fully representative. It provides an opportunity for local people to benefit from the economic growth and development that tourism can offer. The **benefits** of community-based tourism include (Ndlovu and Rogerson, 2004 in Urban-Econ: Border Caves Feasibility Assessment):
 - Promotes local control, ownership and management of tourism initiatives.
 - Retains economic benefits, promoting linkages and decreasing leakages through the procurement of local good and services, employment of local labour, etc.
 - Community-based tourism is regarded as a means of encouraging vibrancy within local cultures
 - Promotes partnership and cooperative arrangements
 - Stimulates skills training and education

Opportunities also lie in the planned initiatives such as nature reserves within upper uThukela on community land belonging to two Amakhozi, Amazizi and Amangwane tribes as well as consolidation of land surrounding Weenen Game Reserve.

- **These are examples of Community Based Conservation Areas (CCA):** Community conservation areas provide a unique opportunity to achieve sustainable development in terms of conserving pristine land and ecologically sensitive areas as well as empowering communities and creating socio-economic opportunities for development. Income is earned from homestays, the sale of craft, tour guiding, cultural performances and nature or heritage trails. SMME development is stimulated community-based tourism. Community conservation areas bridge the gap between socio-economic development and conservation and allow a destination to be planned for tourism purposes as seen through the objectives of the CCA for Amazizi and Amangwane communal areas.

- **The KZN Biodiversity Stewardship Programme:** This is an imperative initiative to be taken into account which is taking place in uThukela DM through the AmaZizi and Amangwane communal owned land which thus far entails of a Biodiversity plan through which the area between the Cathedral Peak (southern portion) of the WHS and the Royal Natal Park (Northern portion) of the WHS, known as the upper uThukela region has been proclaimed as a nature reserve. A nature reserve is deemed to be the highest form of conservation and very beneficial for eco and nature based tourism as shown by the diagramme below.

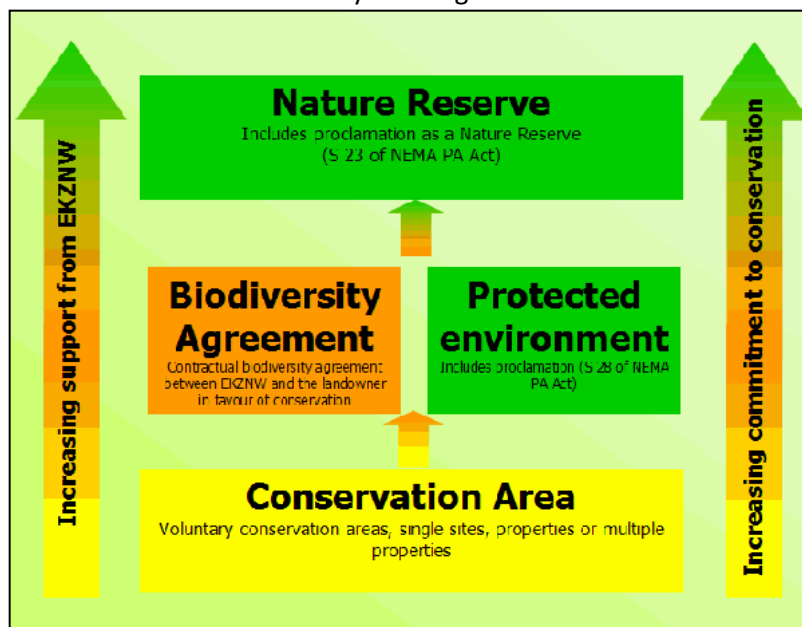


Figure 38: The 3 Main Levels/ Options of Conservation- KZN (Source: EKZNW Stewardship Programme)

- **Adventure and sport tourism:** Adventure tourism is defined as “an outdoor leisure activity that generally takes place in an unusual, exotic, remote or wilderness setting, (sometimes) involving some form of unconventional means of transportation and tending to be associated with low or high levels of physical activity. The activity may entail some element of risk.” Adventure tourism is a market that targets very specific activities. As such, products and services offered this market needs to be tailored and the industry often requires specific skilled personnel such as guides and instructors. There seems to be a demand for increased adventure activity options in uThukela. This needs to be investigated to include extra activities such as bungee jumping, foo fee slides, paragliding, hot air ballooning, off road biking, river rafting, abseiling, fly fishing, mountain bike challenges etc. Sports tourism is a tourism sector which is largely underdeveloped in uThukela, though as potential for golfing, which is also prioritized through the Maloti-Drakensberg Route which runs through uThukela and has 23 golf courses. Here tourist would travel to a specific destination to take part in a particular sport activity, often in a competitive format. Fishing and fly fishing potential should be investigated. It is important to promote further sport and adventure events in uThukela to expose the region as well as increase visitor numbers.
- **Business Tourism (MICE) & Events:** MICE tourism stands for, meetings, incentives, conferencing and events. MICE is used to refer to a particular type of tourism in which large groups, usually planned well in advance, are brought together for some particular purpose. It is clear from the situational analysis that this is a growing sector in uThukela, especially in Emnambithi, Escourt, and throughout the Drakensberg. Accommodation places are usually fully booked when an event is taking place, in certain cases a few

months in advance. This is great for exposure and the local economies; it can also market the areas for future tourism. Emnambithi is lacking a conference facility which can seat over 1000 delegates. MICE tourism is an opportunity which is suggested to be investigated in more detail through an events strategy and calendar as well to create an enabling environment for MICE tourism to grow within.

- Avi-tourism or Birding:** Avi tourism, said to be one of the most powerful conservancy tools for birdlife habitat is fast becoming a key area of tourism in South Africa. Avi-tourism has immense potential to become a driver of local economic growth for local communities. This niche market is a sub category of nature based tourism and has also been identified by the Department of Trade and Industry as a fast growing niche tourism sector, which prompted a research document on Avi-Tourism in South Africa and opportunities and recommendations thereof. In keeping with directives of DTI and given the inherent potential and existing products in uThukela, avi-tourism is seen as a potential project which could enhance tourism and aid in growing the local economy. In order to do this existing birding attractions must be amalgamated into a route for marketing and potential attractions such as the Malendeni Sanctuary rehabilitated. Birding tour guides need to be trained and existing ones sourced to aid with the development of this sector. Also, infrastructure needed would need to be identified and funded.
- Rail tourism:** The existing rail network through uThukela is a strong aspect on terms of tourism hard infrastructure. The electric rail network traverses a substantial amount of uThukela and there is potential for rail tourism. Tourism KwaZulu-Natal (TKZN), in conjunction with the Development Bank of Southern Africa (DBSA), identified the development of rail tourism as a potential market niche for growing the provincial tourism economy in the 2005, KZN Rail Tourism Feasibility study. A strategy was then formulated suggesting uThukela be a part of the then proposed KZN Rail Tourism Association. The opportunity for rail tourism in uThukela is rife and should be considered through further investigation. Local municipalities have also identified the potential of this such as Emnambithi and Imbabazane LMs.
- Agri-tourism:** UThukela is characterised by good agricultural land which can be utilised for tourism purposes as well through agri-tourism. TKZN defines agro-tourism as “the act of visiting a working farm or any agricultural, horticultural or agribusiness operation for the purpose of enjoyment, education or active involvement in the activities of the farm or operator.” Examples of popular agro-tourism destinations are the wine lands of the Western Cape and the tea plantations of Mpumalanga. There are many commercial farmlands in uThukela and potential has been recognised for agri-tourism to be explored. Agri tourism can accrue many benefits to the local economy and communities. Various organisations and linkages can be formed locally.

These linkages can include tourism organisations, farmers, crafters, local government etc. The benefits of these organisations working together can be to promote a wide range of businesses that are producing goods in a rural region. These benefits can be linked to the farmer, the local community and the region as a whole. It is the function of local government to create an atmosphere for economic growth in their respective municipalities. These organisations can benefit from marketing together and not just as individuals. It can be easier to lobby government for assistance be it financial or capacity building. Brochures can be produced that can be made available in local tourist offices. Linkages can be made with other attractions in the area, like games reserves, heritage

sites, battlefields etc. A rural tourism concept, as seen in the definition above, can be applied here.

- **Arts and Craft Tourism:** This is defined as the selling or displaying of products with artistic or souvenir value with other products that emanate from the local culture and / or area. The arts refer to music as well. Given the famous acts that emanate from uThukela such as the Ladysmith Black Mambazo, and Drakensberg Boys Choir, these can be used for promoting a music academy and performance related arts. The products are usually sold in a closed or open area and are usually locally produced and culturally influenced. This is a type of tourism that is being actively encouraged by the authority in KZN. There are a number of artists and crafters in uThukela that sell their craft to retailers including cafes and lodges, and exhibit with the aid of the district. Arts and craft have immense potential as people are skilled. It is recommended that a district craft centre be constructed to serve as a training centre as well. The district therefore needs to continue providing assistance to the arts and craft stakeholders.

Heritage tourism should be integrated with core experiences and ensure quality varied visitor experiences. In conclusion this strategy outlines the niche tourism experiences offered by uThukela DM, and the potential it has to develop these experiences as additional draw cards to the district. **The related projects are lists at the end of this section.**

Strategy 2.3: Enhance Tour Operating services, hospitality and accommodation to support the uThukela tourism industry

This strategy is related to the hospitality industry, accommodation and tour operating industries. They are support services within which the tourist industry relies on to become a success. These services are seen as lacking in uThukela and need to be improved on. On the hospitality side, additional food outlets are needed in areas which have more tourist activity. Current hospitality needs to be enhanced and standards rose which is dealt with in tourism education and awareness. Accommodation seems to be growing in Emnambithi due to business tourism; however certain areas have potential to increase accommodation such as Imbabazane and Okhahlamba. There is potential for rural accommodation in Indaka as indicated by the IDP. A key product to be developed and rehabilitated is the Royal Natal Hotel and Thendele. Tour operators operate ad hoc and there is a shortage of trained tour guides. As seen from the situational analysis, there is potential for local tour guides to be trained especially the youth as guides and site guides. Rural BnBs and village tours are also seen as a potential. **Potential Projects are seen in 5.2.1 below.**

Strategy 2.4: Ensure Investment promotion of tourism in uThukela

This strategy relates to packaging projects so as to promote investment into tourism development in uThukela. It deals with creating investor awareness and confidence, developing incentive schemes to lure in additional development, develop an investment promotion strategy and package potential projects for investments.

Strategy 2.5: Enhance safety and security in the district to support crime free tourism in uThukela

This strategy addresses development of efficient tourist safety and security systems. The strategic focus will require liaison with the SAPS to develop a safety and security plan and engage in tourism awareness and tourism protection. Strategic focus addresses key areas flagged by the SAPS for safety patrol, and general safety input and advice on new tourism products will be necessary.

Strategy 2.6: Promote and Accommodate Accessible tourism

‘Accessible Tourism refers to tourism that enables everyone, regardless of their functional ability or functional limitation, to participate in the tourism experience confidently, independently and with dignity, through the creation of universally Accessible Tourism products, services and environments, and that universal design is systemic throughout the tourism value chain’⁴⁵.

This strategy adheres to this definition and recognises the importance of including accessible tourism in the uThukela tourism Strategy. The strategy therefore aims to create awareness and skills training of tourism staff, promote universal accessibility standards, engage tour operator involvement with this target market and engage all developments to accommodate physically challenged persons.

Proposed Interventions/Projects

The proposed projects for this strategy are listed on the following page.

⁴⁵ Urban-Econ: The Department of Trade and Industry. Accessible tourism Market Assessment Study 2011

Strategy 2.1	Develop and Grow Core tourism experiences (Nature-based and eco-tourism)	Strategy 2.2	Develop Niche Tourism Experiences (Adventure and Sport, Avitourism, Township and Rural Tourism, cultural and heritage tourism and community based tourism)
2.1.1	Support the development of the upper uThukela region and community conservation areas and nature reserves to allow for eco-tourism and allied initiatives	2.2.1	Promote golfing experience to suite a wider range of golfers, from leisure golf to professional golfing and promote golfing events
2.1.2	Facilitate linkages with Sterkfontein Dam Nature Reserve	2.2.2	Develop an inventory per LM of all hiking routes available and map these
2.1.3	Investigate and support eco-tourism initiatives at Ngelegele Community Game Reserve	2.2.3	Investigate, Identify and promote additional adventure and sporting activities and events such as bungee jumping, foot slides, paragliding, hot air ballooning, off road biking, river rafting, abseiling, fly fishing, mountain bike challenges etc.
2.1.4	Investigate the expansion and consolidation of Weenen Game Reserve and investigate potential of a Big 5 Game Reserve	2.2.4	Investigate potential and impact for rail tourism in light of the KZN Rail tourism Feasibility study
2.1.5	Provide Support the restoration of Umsuluzi Game Reserve near Colenso	2.2.5	Promote, develop and support MICE tourism as a key tourist attractor (special attention to events tourism and business tourism)
2.1.6	Provide Support and engage in linkages to Maloti-Drakensberg Route and proposed Trans-Maloti Trekking Trail (Marketing as well) through signage and funding	2.2.6	Identify and develop key existing and potential Township and Rural Tourism projects: modelled on the best case example of Mphopomeni
2.1.7	Upgrade Rock Art Centres in Okhahlamba and investigate potential linkages to proposed environmental interpretation centre	2.2.7	Investigate the potential of avitourism and a birding route linked to Maloti Drakensberg Birding route, Amajuba, Okhahlamba, Ennambithi, Van Reenen, and Imbabazane as part of the proposed district wide route
2.1.8	Develop an environmental interpretation centre in the district linked to a nature/game reserve	2.2.8	Promote, preserve and foster Cultural, Heritage and religious Tourism
2.1.9	Identify areas of environmental significance and plan and engage in rehabilitation initiatives in partnership with Buffer Zone Technical committee	2.2.9	Investigate medical tourism potential near the Drakensburg World Heritage site and Ennambithi LM
2.1.10	Investigate the development of a Cableway as an iconic signature project in line with the KZN Tourism Master Plan	2.2.10	Identify existing and additional Community Based tourism development initiatives and provide support
2.1.11	Develop the R616 - R600 as a scenic route (Spioenkop Battlefield – Bergville – Mnweni – R600 Spioenkop Nature Reserve) in accordance with Provincial Spatial Planning Guidelines	2.2.11	Investigate use of dams for recreational purposes such water activities e.g. Power boats: Qedusizi Dam
2.1.12	Develop a major San interpretation centre and experience linked to Okhahlamba WHS (in accordance with the Tourism Master Plan)	2.2.12	Ensure preservation, maintenance of Battlefields sites
2.1.13	Develop a scenic tourism plan to guide future scenic tourism development in line with the district wide route plan	2.2.13	Ensure museums are open 7 days a week
2.1.14	Investigate and promote eco-tourism as a core experience with related tourist activities (hiking etc.)	2.2.14	Provide support to 'Mazibuye Emasisweni Cultural Village' to function as a successful community initiative
		2.2.15	Facilitate the development of a music academy themed on Ladysmith Black Mambazo and Drakensberg Boys Choir in partner with accredited institutions as well as events and music routes
		2.2.16	Development and Retail of Arts and Crafts for export and through exhibitions in partnership with chain stores

Strategy 2.2	Develop Niche Tourism Experiences (Adventure and Sport, Avi-tourism, Township and Rural Tourism, cultural and heritage tourism and community based tourism)	Strategy 2.3	Tour Operating services, hospitality and accommodation
2.2.17	Support Redevelopment of Colenso to substantially contribute to tourism in uThukela and convert cooling towers to act as an interpretation centre and Abyss Swing (Orlando Towers in Soweto) as well as a viewing tower	2.3.1	Facilitate the reconstruction of the Royal Natal Hotel
2.2.18	Facilitate hosting of international heritage events and conferences in Emnambithi	2.3.2	Package township tours throughout the district
2.2.19	Facilitate periodic Craft markets at pension pay points and coordinate with events	2.3.3	Investigate establishment of accommodation near Lesotho, for hikers in Okhahlamba
2.2.20	Link proposed Dinosaur Valley to palaeontology tourism at Golden Gate Highlands National Park (Free State)	2.3.4	Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /centre
2.2.21	Promote uThukela as a wedding destination	2.3.5	Encourage additional hospitality service/local restaurants or chain food outlets near tourist attractions
2.2.22	Develop and investigate Agri tourism products	2.3.6	Develop a district wide guided tour programme and operating service and Train and develop local specialist tour guides (e.g. Birding, township tours etc.) involving all local municipalities based on demand (include local youths from Inkanyezi Township as Battlefield site guides)
2.2.23	Explore wildlife experiences through promoting and encouraging Big Five Game Reserves in Okhahlamba and throughout the DM	2.3.7	Upgrade Kwa Mtabamanyama Resort
2.2.24	Create a themed heritage and cultural route along R74 (Mpofana – Weenen – Msuluzi – Colenso) in according with Provincial Spatial Planning Guidelines	2.3.8	Investigate the viability of constructing a military camp styled accommodation at Spioenkop Resort
2.2.25	Establish a multifunction centre at Weenen as a tourism Node	2.3.9	Train and develop local youths from Inkanyezi Township to act as Battlefield site guides
2.2.26	Establish Arts and Craft centre in Indaka	2.3.10	Encourage the development of Rural BnB's in all local municipalities
2.2.27	Construct a conference venue in Emnambithi/Imbabazane/Okhahlamba/Escort	2.3.11	Investigate investment by prestigious brands / hotels at Thendele
2.2.28	Zulu Rural settlement and cultural experience in Northern Drakensberg	2.3.12	Package estate development to include Van Reenen
2.2.29	Rehabilitate Malendeni Bird Sanctuary	Strategy 2.5	Enhance safety and security in the district to support crime free tourism in uThukela
2.2.30	Support Craft and Visual Arts exhibition in partner with Dept. of Arts and Craft	2.5.1	Engage SAPS in tourism awareness and tourist protection in uThukela DM involving all LMs
2.2.31	Create and arrange platforms for live performances in support of performing artists aimed at tourist entertainment	2.5.2	Develop a safety and security plan for the district
2.2.32	Implement previously identified tourism projects such as Woodstock Dam, Cannibal Caves and Weenen Cultural Centre	Strategy 2.6	Promote and Accommodate Accessible tourism
2.2.33	Provide support to identified Indaka tourism projects	2.6.1	Awareness creation and skills training to tourism information officers and other front line staff around accessible tourism
Strategy 2.4	Ensure Investment promotion of tourism in uThukela	2.6.2	Development and promotion of universal accessibility tourism standards and apparatus and marketing of accessible tourism
2.4.1	Identify and promote means to identify and ensure investor awareness and confidence	2.6.3	Engage tour operator involvement with this target market
2.4.2	Review/develop incentive schemes necessary for tourism investment promotion throughout uThukela	2.6.4	Ensure tourism developments accommodate physically challenged persons
2.4.3	Develop an investment promotion strategy and incentives policy and package potential projects in collaboration with TIKZN		

4.4.3 Strategic Cluster/Goal 3: People Development- To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence.

This strategy relates to developing the people of uThukela DM. It relates to three main strategic thrusts, that is, addressing transformation, fostering a tourism culture through awareness and skills enhancement and ensuring quality experiences and service excellence. The strategies are discussed below and followed by a list of projects at the end of the section.

Strategy 3.1 Encourage and ensure transformation of the uThukela tourism industry

This strategy relates to encouraging and ensuring transformation in the tourism industry in uThukela through support, equality in services, exposure etc., representation and compliance with BBBEE sector codes. This strategy addressed the following shortfalls with regard to transformation in the tourism industry in uThukela. A formalized transformation in tourism strategy does not exist. There is also no coordinated effort to transform tourism other than the training of interns. There is a lack of research and development and tourism staff need to be capacitated. Entrepreneur development is important to sustain tourism activities and produce more black entrepreneurs. Majority of tourism products are currently white owned and through workshops and stakeholder consultation it was stressed that there is a need for more black owned enterprises and more participation and contribution by communities through community based tourism. There is insufficient information to provide a detailed analysis of BEE Status. Communities lack awareness on tourism and therefore find it difficult to pursue tourism initiatives or have little vested interest. There is also a language barrier.

However, there have been community based projects as defined throughout the report such as cultural center etc. promoting communities and trying to get rural under privileged communities involved in tourism trade and activities as well as a degree of awareness. Efforts do exist however, these programmes are not coordinated and do not reach all people. Given that there has been strides taken, transformation is slowly underway in uThukela and needs much more attention and investigation. Below is a summary explaining the Tourism BEE Charter which the uThukela District Strategy aligns to. Tourism KZN is also an important body with regard to transformation, given that it is one of the mandates is to champion transformation in KZN. In this regard, the focus area of transformation includes provision of advisory services, facilitation of skills development, monitor and facilitate BBBEE Scorecard compliance, facilitate access to funding for tourism, business Centre for SMMEs in KZN and community focus. The uThukela strategy therefore needs to prioritize transformation the tourism sector.

Through government funds initiatives there are Black owned and this has been prioritized and uThukela should therefore take advantage of this to grow its BEE status through the tourism industry.

TOURISM BEE CHARTER (with reference to Urban-Econ: South Coast Tourism Strategy)

The tourism industry in South Africa is largely untransformed with the majority of tourism products mostly owned by whites. While some of the larger tourism enterprises have begun transforming, there is still a long way to go, with only an estimated 6% of listed tourism entities having BEE ownership. Transformation of the industry has also been slow in terms of control and management profiles. With the signing in of the Broad Based Black Economic Empowerment Act, the definition of BEE now includes the ownership, management, employment equity, skills development, affirmative procurement, and enterprise and social development. Through the act, sectors are encouraged to set their own programmes and targets to achieve the overall targets of the act.

A study commissioned by DEAT found that transformation of the tourism industry will:

- Increase the competitiveness of the industry
- Will ensure that the tourist products are more authentic
- Better cater to international tourist demands.

It further found that the low barrier levels for entry into the industry would facilitate the entry of BEE tourism companies. The charter sets the standard of level of inclusion of black people in tourism through the scorecard.

Key elements of this are as follows:

- Voluntary agreements within the industry to achieve empowerment targets
- Provides measurement tools to assist companies to comply with the targets
- Recommendations on how to achieve ratings on the bee scorecard
- Incentives established to help reach these targets such as development funding and that use of BEE compliant supplies will boost private sector companies' empowerment ratings.

In order to prevent the charter from stifling the SMME market, companies with turnover of less than R5 million per annum do not have to comply with the ownership requirements specified in the charter. Key indicators of the BEE Charter and Scorecard are summarised below:

- The scorecard provides the tool to measure BEE progress. The scorecard measures three core elements of BEE:
- Direct empowerment through ownership and control of enterprises and assets (ownership and strategic representation)
- Human resource development (employment equity and skills development)
- Indirect empowerment through preferential procurements and enterprise development (preferential procurement, enterprise development and social development).

Strategy 3.2 Foster a tourism culture through tourism awareness and education across the district

This relates to the need for awareness within the community on tourism. It is important that this is also pulled through to schools within the Municipality, meaning local educators are of particular importance to this Strategy. This strategy addresses general community understanding of the tourism sector, its importance, and the role it can play in the socio-economic development of the Municipality's communities at large. It also incorporates friendliness toward tourists, such that they are made to feel at home by the community. It also includes service levels at key points such as filling stations, restaurants, chemists, and other places where tourists may visit. Safety is also an important factor not to be forgotten in the reception of tourists. This will require participation by the South African Police Services (SAPS) representatives in the Municipality.

Thus strategy also addresses an important facet of awareness relating to environmental awareness. UThukela has rich in environmentally sensitive land which must not be degraded in any way. This type of land is essential for nature based tourism. It includes awareness of the local community about the natural environment, and is important because this it is one of the competitive advantages of uThukela tourism. It addresses education about the environment and its value, and addresses negative environmental problems such as poaching, litter, and "environmental" graffiti

(e.g., carving into trees), and guidance on the use of wood during crafting. At present this occurs on a small scale, and therefore has limited impact.

It is suggested that communities also be made aware of heritage resources. Often, communities are not aware what comprises a heritage resource, and what should be done with such resources once they are identified. Physical resources such as graves are often vandalised or stolen.

This strategy deals with broad based skills development through programmes, and training facilities, hospitality schools etc. These include, for example, the provision of tour guide/ operator courses, and will relate directly to the type of products being developed. The need for a hospitality school is addressed. Tourism awareness programmes will encourage participation in such courses, for potential entrepreneurs who are interested.

This strategy importantly deals with developing a tourism culture among the communities and youth in uThukela, through career choice perception.

Strategy 3.3 Ensure Quality Experiences and service excellence

This strategy addresses tourism capacity building and professional development in all spheres including, local community leaders, local and district tourism municipal workers such as tourism officers, information officers, municipal managers etc. It also includes strengthening inter-governmental relations between tourism stakeholders. This strategy addresses the issue of the need for quality standards and grading of the tourism services offered.

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

Proposed Interventions/Projects

Please turn over for the proposed interventions for this strategic cluster.

Strategy 3.1	Encourage and ensure transformation of the uThukela tourism industry	Strategy 3.2	Foster a tourism culture through tourism awareness and education across the district
3.1.1	Conduct a baseline study and transformation plan for uThukela Tourism with a M&E system	3.2.1	Engage continuous market research and development through an organised marketing and research plan involving participation of communities (See-Yenza Project)
3.1.2	Facilitate continuous SMME and Business Support to tourism role-players (eg. Crafters) through a development programme	3.2.2	Facilitate a district tourism skills audit and development plan to guide and involve LMs
3.1.3	Ensure equality of services and exposure to rural and undeveloped tourism stakeholders and service providers throughout uThukela	3.2.3	Create a district wide strategy for tourism education and awareness programmes (career choice perception) for interested and passionate communities and school children to be rolled out per LM (See proud Schools project) in partner with educational institutions
3.1.4	Ensure fully representative CTOs, RTOs and organisations/forums associations and address language barrier	3.2.4	Facilitate the establishment of a hospitality and tourism training and development centre in the district in partner with recognised tourism training centres with satellite offices
3.1.5	Develop a local procurement strategy linked to local SMMEs and local product owners	3.2.5	Improve tourism and hospitality career choice perception and information for school learners
3.1.6	Encourage mentoring between emerging and established tourism product owners through an incentive scheme	3.2.6	Create a 'one-stop-shop' where learners and students can access accurate information preferably at a local library or tourism office
3.1.7	Promote compliance with Tourism B-BBEE sector code	3.2.7	Engage tourism and tourism social awareness and aimed at gearing community for tourism (See Van Reenen Yenza Project and promote road shows)
3.1.8	Promote career development and support programmes for previously disadvantaged persons to be rolled out throughout the district	3.2.8	Promote and develop environmental awareness programmes for communities and schools
3.1.9	Develop and implement a campaign to stimulate a culture of travel amongst previously disadvantaged	3.2.9	Facilitate ICT training and skills development for youth in line with Van Reenen Yenza project
3.1.10	Identify and support SMME tourism projects that stress on rural tourism development		
Strategy 3.3	Ensure Quality Experiences and service excellence		
3.3.1	Hold workshops on continuous professional development for current tourism staff, Amakhosi and ward councillors		
3.3.2	Facilitate and fund training programmes in service excellence for current tourism employees throughout the district.		
3.3.3	Facilitate a system of recognition and strengthen relationships between tourism stakeholders through internal events e.g. social events, team building as a district etc.		
3.3.4	Develop and implement major periodic training and capacity building programmes for municipal officials, Amakhosi, ward councillors, CTO/LTA officials and staff and encourage professionalism in the tourism industry		
3.3.5	Develop a system of grading and standards through the Tourism Grading Council of South Africa or SATOUR and linked to CATHSSETA for all accommodation, catering and other service providers including info centres to obtain baseline, provide guidelines, and ensure compliance through an annual monitoring and evaluation system of improvements (eg. tourism inspector)		
3.3.6	Establish service feedback systems		
3.3.7	Explaining, lobbying and prioritising the tourism industry with Politian's, Amakhosi and government officials		
3.3.8	Auditing of illegal and legal products and provide assistance and incentives to legalise products		

4.4.4 Strategic Cluster/Goal 4: Tourism Infrastructure Investment Framework-To create a favourable built tourism environment to become conducive to growth and development and to boost investor confidence

This goal entails ensuring adequate tourism infrastructure is available for ease of tourism operations and to create a favourable environment to enhance the tourist experience and attract further business investment. Adequate infrastructure provision allows for an environment within which businesses can operate and thrive in. This will include reducing the establishment and operating costs of businesses. The importance of infrastructure cannot be stressed enough. This framework directs and prioritises infrastructure investment. As time goes on and if there is increased demand for tourism and an influx of visitors, this will place pressure on existing services and infrastructure, which needs to be taken into account and planned for.

This determines whether or not a tourist is able to visit an area and whether the area is conducive for businesses to operate. It determines accessibility to and around tourism attractions and products and regulates ease of movement. It is the duty of government to facilitate an enabling environment for tourism growth and development and in this case business retention. Infrastructure is the backbone of every economy, including tourism. Infrastructure comes in many forms, from social, economic and environmental to signage. In this case tourism infrastructure includes transportation infrastructure, bulk and basic services and signage. The below discussed strategies deal with these sectors of infrastructure.

Strategy 4.1: Maintain and upgrade Transport (road, air and rail), communications and Services infrastructure to create a conducive tourism environment

This strategy addresses the need for maintenance and upgrading of transport and bulk services infrastructure. Transport infrastructure includes roads and bridges, rail and air infrastructure. The tourism industry cannot function with proper transport infrastructure. Transport infrastructure determines how a visitor accesses a place and travels through it. Also important is the need to maintain and upgrade existing transport infrastructure to ensure constant ease of movement. Transportation links the various destinations and ferries people, goods, and services. Tourists are attracted to areas with good well maintained and risk free transport infrastructure. uThukela has relatively good access into the district through the N3 and N11. However other major routes such as the R74 leading into Okhahlamba linking uThukela to the Free State is in a state of disrepair and needs to urgently be attended to as this is driving tourists away from the district. Other important routes linking the local municipality and seen as an opportunity for integration of LMs are, R600, R616, R103, and R602 which need to be kept in good condition.

Services include waste removal, electricity provision, water supply and sanitation. These basic and bulk services are essential for the well-being of uThukela's tourism industry. Visitors travel to a destination which has access to services and are well serviced. Businesses locate in areas where it is feasible in terms of service provision. Service provision attracts investment. It was found that not all rate payers receive services, and often rural areas are underdeveloped with regard to service provision. In order to promote rural and township tourism, service delivery needs to increase.

Another key component of this strategy is communication infrastructure. The efficiency of providing communications infrastructure can increase the productivity of businesses. The more access there is to technology the more integrated rural areas become with the outside world, hence integrating rural areas with the global village. **Tourism projects are listed below.**

Strategy 4.2 Maintain and facilitate provision of Signage to direct visitors in and around uThukela DM

Signage is an important marketing mechanism can be improved to be more effective in assisting tourists coming to the area. Tourism signage is a means to get tourists to their required destination and aids in directing visitors around the destination and to other attractions. However, when effective and relevant, it can also act as a mechanism to get tourists to go a specific tourism product that they were not initially planning to go to. As such, tourism signage is both necessary tourism infrastructure and a marketing mechanism. Tourism signage is uThukela, can be significantly upgraded to contribute to a good impression of the area, and to getting tourists to stop at tourism products. Signage affects the extent to which an area is marketed along main movement routes. Signage seems to unanimously be an issue of concern throughout uThukela DM. A key initiative to be noted which uThukela is recommended to synergise with, is the forthcoming Signage and Implementation Strategy to be conducted by Maloti-Drakensberg Route as a macro programme linking to National Priority. The reason for synergy lies in that many roads and therefore signage locations fall within uThukela DM and uThukela should be involved. **Potential projects are listed at the end of this section.**

Potential Interventions/Projects

The proposed projects for this strategy are listed on the following page.

Strategy 4.1	Maintain and upgrade Transport (road, air and rail) and Services infrastructure to create a conducive tourism environment	Strategy 4.2	Maintain and facilitate provision of Signage to direct visitors in and around uThukela
4.1.1	Facilitate upgrade of R74 with Free State	4.2.1	Erect Info laphas at all entrances to destinations and local municipalities
4.1.2	Ensure ICT infrastructure is prioritised and developed to include 3G networks and access to internet and training	4.2.2	Identify, upgrade, maintain and add new and attractive tourism signage throughout the district exposing attractions and towns
4.1.3	Facilitate regular maintenance and upgrade of roads to tourist attractions in particular R 616, R 600, R 602, R 103, N11, P 341, D364, Ntabamhlope road, roads leading to Escourt and surrounds, Cathedral road, Retief Klip, Barefoot Woman Monument and Bloukrans	4.2.3	Provision of signage along main routes, R616, R73, R 600, R103, R 74 to expose the attractions and towns to passers-by and help direct visitors
4.1.4	Upgrade and maintain the road to Spioenkop (R181)	4.2.4	Provision and maintenance of signage to existing battlefields attractions
4.1.5	Upgrade Ladysmith airport to operate more efficiently	4.2.5	Facilitate the provision of signage of N3 and toll road to expose the district to passers by
4.1.6	Upgrade and maintain roads leading to Battlefields tourism attractions	4.2.6	Develop a district wide tourism and advertising signage policy, investment and communication framework to systematically guide allocation maintenance and provision of signage in line with existing Signage Strategy (e.g. forthcoming MDR Signage Strategy) and inclusive of Battlefields signage
4.1.7	Improve road linkages in rural municipalities of Imbabazane and Indaka, and Okhahlamba (ward 13)	4.2.7	Facilitate provision of signage for Drakensberg Experience Route in collaboration with Open Africa and Bushman's River Tourism Association

Strategy 4.1	Maintain and upgrade Transport (road, air and rail) and Services infrastructure to create a conducive tourism environment	Strategy 4.2	Maintain and facilitate provision of Signage to direct visitors in and around uThukela
4.1.8	Upgrade (tarring) of D 364 and P 341 as an alternative to Van Reenen pass	4.2.8	Facilitate provision of signage for Maloti-Drakensberg Route in accordance to the forthcoming MDR Signage Strategy
4.1.9	Upgrade and maintain road to Injisuthi	4.2.9	Ensure provision of signage to townships and to internal and main roads, throughout the district
4.1.10	Improve services to rural areas		
4.1.11	Ensure infrastructural support to MICE tourism through ICT development and tour operators		
4.1.12	Upgrade and maintain road leading to Mnweni cultural centre		
4.1.13	Ensure service provision to rate paying service providers and property owners engaged in tourism to make areas conducive and attractive to tourism and further investment attraction		
4.1.14	Identify areas of strategic tourism importance and prioritise service delivery (water, electricity, sanitation, waste removal)		
4.1.15	Ensure infrastructural support to Oliviershoek Route to link Bergville and Winterton		
4.1.16	Start a district wide 'clean up' campaign championed by LMs, guided by DM		
4.1.17	Provide directive on using sustainable energy alternatives in new developments and at tourism information offices (e.g. Solar energy)		
4.1.18	Recognise the proposed link road by Okhahlamba Development Agency from Champagne Valley with the Cathedral Peak Valley		

4.4.5 Strategic Cluster/Goal 5: Policy, strategy, governance, research & knowledge management monitoring and evaluation- To create an enabling institutional environment through knowledge management, developing collaborative partnerships, producing regulatory measures and promoting responsible tourism and green principles to tourism in uThukela.

This goal includes addressing shortfalls identified in knowledge management, distorted and fragmented communication and coordination between tourism role players in uThukela and the need for responsible and green tourism principles to be promoted. This strategic cluster, as indicated by the KZN Tourism Master Plan aims at 'improving the management of and coordination and communication on tourism issues, thereby improving effectiveness of the tourism interventions, improving partnerships and funding for tourism and putting in place the necessary projects to measure certain aspects of the tourism sector.

Strategy 5.1: Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry

The aim of this strategy is to provide meaningful information and analysis timeously to stakeholders in the tourism sector of uThukela. A thrust is to provide efficient knowledge and database management systems for the tourism sector and to provide measures to track progress on targets and objectives. UThukela has a major shortfall with regard to this and this strategy therefore aims to address the lack of collective data and visitor statistics as well as the lack of adequate research. UThukela shows signs of insufficient data to adequately monitor and evaluate tourist trends and numbers and collation of information which is of grave importance for future planning as this information indicates the demand for tourist activities and which market segments are entering the area and their needs.

Strategy 5.2: Enhance tourism through institutional arrangements, collaborative partnerships and policy

This strategy aims at improving coordination of tourism thereby reducing duplications, improving effectiveness of support and interventions and improving the scope and range of tourism support and interventions. This strategy also aims at formulation of collaborative and effective partnerships to ensure that tourism is a true partnership between the public and private sector and those opportunities and mechanisms are created for collaboration between stakeholders. The strategy also holistically looks at improving budget allocations to tourism in uThukela by implementing a system to rate and approve tourism projects etc. UThukela is characterised by weak and fragmented institutional arrangements and communication among tourism stakeholders is very poor and uncoordinated. There is no form of regulation and no existing by-laws. This strategy addresses these shortfalls **through the proposed projects listed below**. A main facet that will be discussed in the institutional section below is the need for a united and collaborated tourism association to deal with the marketing component.

Strategy 5.3: Promotion of responsible tourism and green principles in tourism development

The aim of this strategy is to ensure that projects are set for ensuring implementation and incorporation of responsible tourism in all tourism projects through initially creating awareness and capacitation on the notion of responsible tourism and what it entails. Responsible tourism is to be embedded in marketing to create a uniform awareness and inherent duty to practice responsible tourism. In order to achieve effectiveness, businesses and tourism enterprises will be supported to incorporate responsible tourism principles. Another aspect of this strategy involves the incorporation of green principles in tourism development in uThukela. The aim is to encourage new development and existing businesses to adhere to green principles. It also looks at providing incentives for green principles to be adhered to in uThukela's tourism industry as well as to achieve long term sustainability.

Strategy 5.4: Provide a sustainable Planning framework to guide future tourism development and investment

This strategy relates to fast-tracking of planning processes, undertaking land audits to determine vacant land for future tourism projects and investments to occur. Bureaucratic challenges are also to be identified and addressed to facilitate tourism projects to run smoothly. A spatial framework will be necessary for planning an investment framework for future projects with potential investment areas identified. This strategy is essential for the efficient planning for tourism in the district. At the moment no such measure exists to regulate the spatial planning processes. This process will ensure speedy roll out and ease of development. This strategy also deals with new tourism developments complying with PDA and NEMA regulations.

Proposed Interventions/Projects

Strategy 5.1 Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry		Strategy 5.2 Enhance tourism through institutional arrangements, collaborative partnerships, communication and policy	
5.1.1	Formulate a knowledge management strategy and system for collating and presenting information and visitor statistics to track demand include audit of the amount of jobs/employment figures currently occupied in all tourism related initiatives as well as revenue earned.	5.2.1	Formulate a communication plan for collaboration and strengthening of the relationship between public and private sector
5.1.2	Provide bursaries for postgraduate research studies on tourism in uThukela	5.2.2	Establish a good working relationship with EKZNW, TIKZN, Amafa, Ingonyama Trust, Maloti-Drakensberg Forum through a process/forum to integrate these stakeholders and provide support

5.1.3	Mandate registration of all tourism enterprises operating in uThukela with a C.T.O	5.2.3	Develop and implement tourism policy and by-laws on registration of tourism businesses, licences, environmental health issues, public liability insurance, development and location of signage and the location of craft stalls and provide guidance to LMs to formulate by-laws
5.1.4	Develop a district tourism information system and database of all tourism attractions and products that is constantly updated and accessible to all stakeholders and make available on proposed website	5.2.4	Ensure adequate staffing is provided at district level
5.1.5	Partner with a recognised educational centre of excellence to conduct research to be used in tourism development in uThukela as tool to track tourism development	5.2.5	Ensure cross boundary linkages with Free State, Lesotho and Amajuba etc. through Van Reenen, Maloti Drakensberg Route, N3 Gateway etc.
5.1.6	Agree and implement institutional responsibility and capacity for research and information	5.2.6	Develop a single District Tourism Entity to consist of a District Marketing Organisation / Regional Tourism Organisation and a District Tourism Forum
5.1.7	Implement annual performance plans		
5.1.8	Develop a research programme and impact assessments to monitor and measure the attainment of targets and objectives	5.2.7	Provide support to ensure all LMs have tourism sector plans in place
5.1.9	Align research to regional and national tourism research templates (if or when implemented)	5.2.8	Support Indaka, Emnambithi and Imbabazane to develop operational C.T.Os if needed
		5.2.9	Hold a workshop/seminars with all LMs and other stakeholders to define roles and responsibilities
		5.2.10	Oversee that ALL local municipalities are equipped with a tourism official and Local Tourism Forum (LTF) as per Provincial requirements
Strategy 5.3 Promotion of responsible tourism and green principles in tourism development		Strategy 5.2 Enhance tourism through institutional arrangements, collaborative partnerships, communication and policy	
5.3.1	Create visitor awareness of responsible behaviour in communities in uThukela and the environment	5.2.11	Demonstrate government support for private sector initiatives
5.3.2	Awareness and capacity building on responsible tourism for government tourism officials and tourism marketing organisations	5.2.12	Secure and lobby funding for tourism initiatives and address the need for increased tourism budgets
5.3.3	Embed responsible tourism messaging in marketing activities	5.2.13	Investigate alternative revenue generating models for tourism funding
5.3.4	Provide support to tourism businesses and communities to implement responsible tourism	5.2.14	Produce a BR&E strategy for tourism businesses
5.3.5	Ensure that green principles are incorporated into new tourism developments and investigate incentives for the incorporation of green principles/ link to grading and award system	5.2.15	Implement a system to rate and approve tourism projects submitted for funding
5.3.6	Strive towards protection of environmentally and historically significant sites.	5.2.16	Continue to be involved in the Ambassador programme by DEDT by soliciting support
Strategy 5.4 Provide a sustainable Planning framework to guide and fast track future tourism development and investment		5.2.17	Identify bureaucratic challenges and address these
5.4.1	Facilitate fast tracking of planning processes (e.g. Development approval processes) as well as land auditing and land availability database to enable development to occur	5.2.18	Operationalize the District Tourism Forum in conjunction with functioning CTOs and proposed RTO
5.4.2	Identify bureaucratic challenges and obstacles to tourism developments & address these.	5.2.19	Establish a good working relationship and dialogue with Maloti-Drakensberg Route/MDRP and provide support where needed
5.4.3	Development of a spatial framework with tourism nodes and corridors to focus investment and review every 3-5 years		
5.4.4	Develop a land use database for packaging of land to determine vacant land, undevelopable and developable land etc. with GPS coordinates and update regularly		
5.4.5	Ensure consultative process with all stakeholder authorities involved in tourism, when planning and new developments are being undertaken (e.g. MDR tourism working group, local MDRF cluster)		

5.4.6	Ensure developments comply with PDA and NEMA (EIA regulations)		
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4.5 Institutional Framework

The institutional structure provides a means of a framework which amalgamates and unites all tourism role-players and stakeholders in order to create a coordinated and robust, fully representative tourism sector to function effectively. This needs to be done in the light of adequate communication among stakeholders as well as the strengthening of relationships to create harmony and compatibility within the tourism sector in uThukela. The structure of this section is illustrated in the adjacent diagram.

4.5.1 Recommended Model by the KZN Tourism Master Plan

The current proposed institutional structure by the KZN Tourism Master Plan of 2011 and that should be aligned to by local, district and metro is illustrated below. The illustration indicates the options for structuring as well as the required elements. The options will be tailored to suit the institutional characteristics of the unique regions.

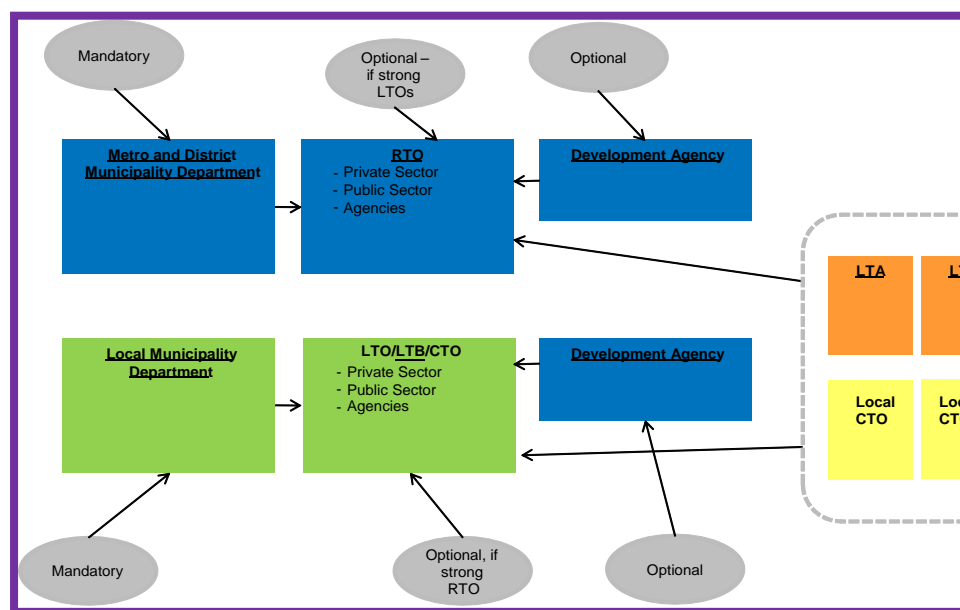


Figure 39 - Recommended Institutional Structure as per KZN Tourism Master Plan (Source: KZN Tourism Master Plan: Executive Summary 2011)

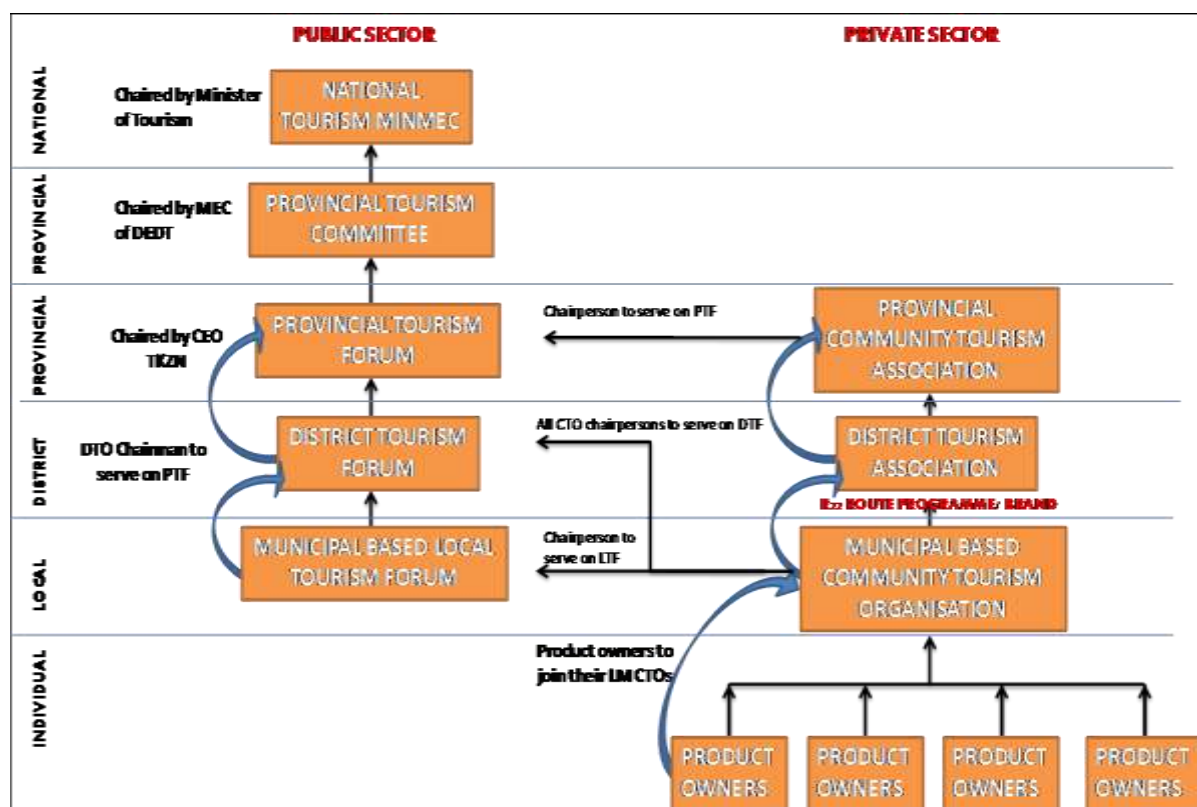
According to the Master Plan, at the metro, district and local level, the following aspects of the structure are non-negotiable and mandatory:

- All municipal (district and local) and metros must have a departmental responsibility for tourism and a resource allocation to tourism which UThukela as a district has; however, not all local municipalities have a dedicated tourism official.
- All areas of the province should be covered by a Regional or Local Tourism Organization/Bureau/Community Tourism Organisation (RTO or LTO/LTB/CTO)'. Four of the local municipalities, Emnambithi, Imbabazane and Okhahlamba, UMtshezi LMs have either C.T.Os or L.T.Fs, whereas Indaka does not.

According to the KZN Tourism Master Plan, 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. The illustration above shows that a development agency is optional. It is also optional for a district to choose to have either a District Tourism Organisation and a Community/Local Tourism Organisation, or both. Again this will depend on the unique characteristics of the district.

4.5.2 Standardised Tourism Institutional Model

The diagram below illustrates an ideal institutional structure at the various tiers of government. This is a widely accepted structure. The below illustrated structure allows for both a private and public sector leg of tourism. These tourism bodies/organisations are separated in function yet are interrelated in communication and representation as shown by the diagramme below. These bodies are organised at the different levels of government. This structure however, leaves out the optional development agency component which the KZN Tourism Master plan illustrates; however, this is implicitly implied according to the agreements and arrangements by the stakeholders. The diagramme below therefore shows the communication and hierarchy of the structure in relation to the recommended tourism bodies.



The points below provide an indication of the communication between the public and private sector.

- Product owners make up the committee of the Municipal based community tourism organisation, whose chairperson serves on the Municipal based Local Tourism Forum⁴⁶
- The chairman of each Municipal C.T.O is to make up the District Tourism Association. The C.T.O chairpersons are then to sit in the District Tourism Forum
- The District tourism Association then sits on the Provincial Tourism Association, with the chairperson of the Provincial tourism association sitting on the Provincial Tourism Forum.

⁴⁶ Please note that with reference to this diagramme, Forums relate to the public sector and organisations, and associations refer to the private sector.

4.5.3 Proposed Institutional Structure for uThukela District Municipality

A core thrust that uThukela needs is a strong and united tourism marketing action integrating the diverse attractions and experiences into a unified message aimed at attracting domestic and international tourists. In order to achieve this unified approach to the marketing of the district a strong, unified and integrated institutional and organisational structure is required, which is recommended in this section of the report.

The institutional structure provides the main thrust of the strategy to address the fragmented functioning of the stakeholders collectively to avoid duplication of efforts and to market and promote uThukela and what it has to offer and not individual experiences and products. There should be equality and just tourism operation where every tourism stakeholder receives equal attention, exposure and recognition.

One of the main challenges is that there is limited coordination at the district level to pool resources, initiatives and role players together. Limited coordination relates to both institutional arrangements and with regard to tourism development and marketing as well as regulation. Stakeholders need to work in synergy to achieve integrated and strong tourism linkages and growth and development.

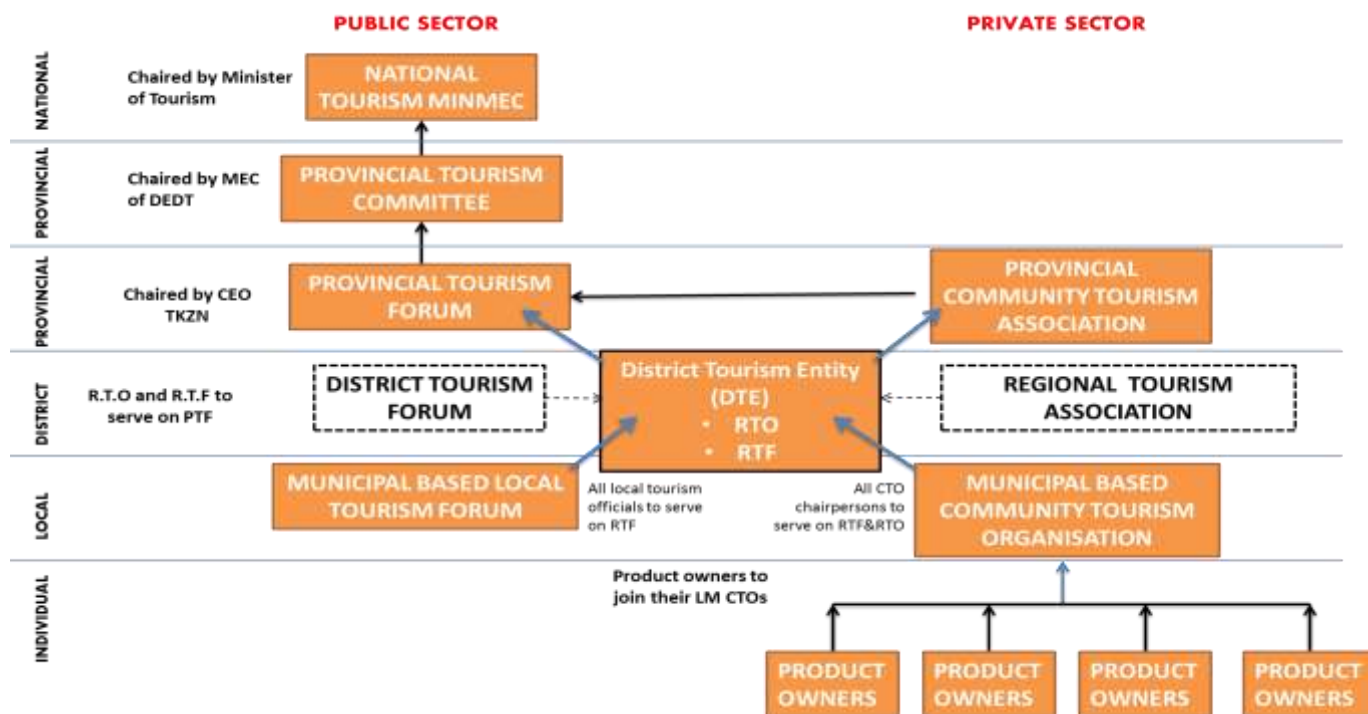
UThukela, made up of five unique local municipalities, which implies a complex institutional structure with the various unique dynamics of the different local municipalities. A challenge faced by district is that, in not all cases are the structures in place, making it difficult for the district to have an operational structure in place, this challenge will be tackled through the framework y providing a set of recommendations to follow. In uThukela, not all municipalities have C.T.Os⁴⁷, two of which do have C.T.Os, namely, UMTshezi and Okhahlamba LMs, and the other two have L.T.Fs⁴⁸. In line with the standard tourism institutional model described above, at the local municipal level, there should be a C.T.O and an L.T.F, which not all LMs align to for various reasons. Given these considerations of the uniqueness and complexity of institutional arrangements at the local level, considerations for the district and local structures are made below. At the district level as identified through the situational analysis, there is a shortage of staff which is a hindering factor for implementation. The considerations followed in this regard are:

- Flexibility – due to the amount of LMs and inconsistency in structure
- Full inclusivity of all related and affected stakeholders
- Enhanced communication and limiting duplication of efforts
- The need for LM institutional structures to be in place to cater for individual LM needs and
- The need for a district wide tourism association
- To operationalize the current District tourism Forum which is currently failing to achieve its objectives.

Tourism in uThukela proves to have a lot of potential with an existing tourism visitor base and world renowned attractions drawing visitors to the region. With five LMs and various uncoordinated tourism bodies, associations, there is a need for flexibility of structures, increased communication and the mandatory tourism structures in place. The above model has been adjusted to suit the uniqueness of uThukela and the five local municipalities as depicted by the diagram below.

⁴⁷ A C.T.O. is a community tourism organisation representing private service providers.

⁴⁸ An L.T.F is a local tourism forum which makes up the public leg of the structure as illustrated by the ideal structure presented in 6.2 above.



The following recommendations are made for tourism to function efficiently in uThukela:

4.5.4 Recommendation 1: Develop a Regional Tourism Organization incorporating the District Tourism Forum as a Legal Municipal Entity

It is recommended that a single body, a District Entity, be established at district level which consists of both private and public sector interests. This amalgamates a Regional Tourism Association (R.T.O), and a Regional Tourism Forum (R.T.F). The district entity lies on the principle of the combining public and private sector to strengthen relationships and provides cohesion. It is recommended that the district assists the private sector with means to attend the crucial meetings.

The D.T.E is envisaged to function as a Municipal Owned Entity⁴⁹ established in terms of the Municipal Finance Management Act No. 56 of 2003 and Municipal Systems Act No. 32 of 2000 where the municipality has ownership but the private sector manages and run the entity. This structure is envisaged to integrate and strengthen relations between the public and private sector as per legal requirements stipulated for the formation of a municipal entity. Municipal entity is a legal description. The main roles of the municipal entity (R.T.O) are as follows:

- Manage and Market tourism in uThukela
- Promote tourism growth and development
- Motivation of projects (product development)
- Running of all information offices (branding, marketing outreach, distribution)
- Would appoint CEO and staff
- Provide a secretariat function to the R.T.F

⁴⁹ 'A municipal entity is a mechanism used by a municipality to deliver services to its community. Each municipal entity is an "organ of state" and must comply with the legislative framework which ensures accountability, transparency and consultative processes, similar to requirements that apply to a municipality in its own right. Municipal entities are accountable to the municipality or municipalities (e.g. a multijurisdictional entity) that established the entity. The entity must perform according to a service delivery agreement and performance objectives set by the municipality. As their debts, liabilities and decisions are made on behalf of the municipality they may be disestablished if they fail to perform satisfactorily or if they experience serious or persistent financial problems' (As per National Treasury definitions).

- Membership Update and Signing up of New Members
- Provide Tourism Advise to Existing and New Members
- Coordinate Training and Workshop for participants in the Tourism Sector
- Monitor Compliance to District and Local Tourism Policies by Established and New Entrants to the Local Tourism Operator Industry

4.5.5 Recommendation 2: Flexible Local Structures and Local Municipality Tourism Officials

At local level, local municipalities and the respective private sector owners should be allowed sufficient flexibility to develop their own structures based on individual municipality needs. The C.T.Os however, has sitting power or can become board members of the R.T.O and the L.T.Fs will be a part of the R.T.F. According to the recommended institutional structure by the KZN tourism Master Plan as illustrated above, it is mandatory that there is a L.T.F at local level, and a C.T.O is optional if there is a strongly functioning R.T.O. The aim of these institutional structures is to facilitate equal access to opportunities by local communities, ensure legal requirements and establish linkages between, private sector, communities and government. The concept of Community Based Tourism Associations is advocated by the White Paper on the Development and Promotion of Tourism in South Africa (1996) and KwaZulu-Natal White Paper on the Development and Promotion of Tourism (2008). These structures need to be developed and put into place in order for the R.T.O to function effectively. Local tourism officials need to have an honorary seat at C.T.O meetings etc. and private sector needs representation at the L.T.F in order to strengthen and build relationships between public and private sector. However, it is ideal for each local municipality to have a C.T.O to represent on the R.T.O.

The KZN Tourism Master Plan mandates that all municipal (district and local) and metros must have a departmental responsibility for tourism and a resource allocation.

4.5.6 Recommendation 3: District Municipality Staffing

It is recommended that at the district level, there should be adequate staff to carry out tourism functions. Priority should be given to fulfilling the vacant position for an assistant tourism officer as indicated through the institutional analysis in section 2.8 above. This position however should preferably be a permanent position or on a five year contractual basis with an intern to assist.

An important consideration with regard to the district level staffing that will influence staffing decisions is the proposed Regional Tourism Organisation recommended above. This organisation as indicated in the detailed concept plan in section 8 below identifies the proposed functions of the R.T.O. The proposed organisation will absorb many of the functions, mainly marketing at the district level. The amount of any other extra staff required would need to be determined by the DM according to the year plan for tourism in accordance to the outcomes of this strategy.

4.5.7 Roles and Responsibilities

4.5.7.1 Roles and Functions of Local and District Municipalities in Tourism

The roles of district and local government are defined below. It is seen as imperative to uThukela and all stakeholders to understand the working relationships and functioning between local and District municipalities with regard to tourism. The following extracts are taken from a presentation given by the Department of Economic Development and Tourism in November 2011.

The role of the District council is:

- Integrating provincial tourism objectives into District plans and priorities;

- Driving the development of and implementation of local tourism policy;
- Urban and rural planning and development of tourism products and services;
- Budget for the effective implementation and growth of tourism in line with the Provincial objectives;
- Allocate Institutional capacity and dedicated and skilled Human resources to perform tourism function;
- provision of local infrastructure;
- Creation and co-ordination of tourism experience routes across its district and beyond municipal boundaries;
- Providing Tourism support to entrepreneurs and investors.

Role of the Local Government is:

The provincial experience offering is a combination of the local offerings. Local government is even closer to the product than the national or provincial governments. The exact role of the local governments in the tourism development thrust will be determined by local conditions existing at the provincial levels and most importantly, the availability of the necessary financial means and skills base to carry respective functions. Local government must be organized to deliver on:

- Integrating tourism policies into local economic development plans;
- Implementing local tourism policy;
- Maintenance of specific aspects of the tourism product at local level;
- Provision and maintenance of tourist services, sites and attractions and public services;
- Maintaining database of registered tourism products and service providers;
- Drive quality assurance
- Provision of local infrastructure;
- Health, safety, licensing and local by-law compliance;
- Local information services;
- Facilitate the participation of local communities in the tourism industry

4.5.7.2 Role of private sector

According to DEDT, 2011, the private sector should own and therefore drive tourism. The private sector is not only the large established players; it is made up of large, medium, small and micro businesses. It is the partner that views tourism master plan and experience profile of the province, understands the market opportunities, and therefore:

- Invests in Tourism planning and service provision
- Develops the Tourism product
- Packages the experience
- Operates and manages tourism businesses
- Provides the services
- Creates jobs and trains personnel; and
- Has to be the agents of transformation by supporting the entry of other players – whether small, medium or large.

4.5.7.3 Role of communities⁵⁰

Communities are also expected to play a vital role in the development of tourism. Many communities and previously neglected groups, particularly those in rural areas that have not actively

⁵⁰ As taken directly from VIC Framework, 2011

participated in the tourism industry possess significant tourism resources. The role of communities in the new tourism thrust includes:

- organise themselves at all levels (national, provincial and local) to play a more effective role in the tourism industry and interact with government and role players at all levels;
- identify potential tourism resources and attractions within their communities;
- exploit opportunities for tourism training and awareness, finance and incentives for tourism development;
- seek partnership opportunities with the established tourism private sector;
- participate in all aspects of tourism, including being tourists;
- support and promote responsible tourism and sustainable development;
- oppose developments that are harmful to the local environment and culture of the community;
- participate in decision-making with respect to major tourism developments planned or proposed for the area;
- work toward enhancing the positive benefits of tourism and minimise the negative impacts;
- organise themselves to maximise the sharing of information and experiences, possibly facilitated through financial assistance by local governments;
- have a representative voice in all tourism structures at national, provincial and local levels;
- encourage the press, particularly the radio and the print media to proactively provide tourism information and awareness to communities;
- work closely with NGOs to educate communities concerning tourism and engender tourism awareness;
- make information on community tourism resources and attitudes transparent and accessible to all levels of national, provincial and local governments;
- sensitise the private sector, tourism parastatals, environmental agencies and NGOs to the importance of communities involvement in tourism development; and
- actively participate in and promote responsible tourism.

4.5.7.4 *Role of C.T.O/R.T.O*

The KZN Tourism White paper clearly spells out the role of the CTO/RTO as follows:

- Encourage tourists to visit the destination and experience what it has to offer thus benefiting the community economically,
- Encourage and develop ways in which a community can be more aware of, and skilled in tourism so that members of the community treat tourists correctly
- Ensure as custodians of local tourism that the right kind of market -driven and tourism infrastructure is developed and effectively managed in its locality- this includes attractions, accommodation, roads and shops for tourists,
- CTO must be representative of all people in the community, it must be autonomous. It must be ensured that the CTO focuses on being truly representative of the community and not take on the role of DMO or a “for profit” role. This will distract from its community mandate and may result in benefiting a few rather than the community at large
- Be in touch with and have input into local planning with for example the IDPs, LEDs, and the Provincial Tourism Master plan,
- Be part of the process when projects are agreed this includes but not limited to, rejuvenation projects, poverty alleviation projects and capacity building projects and
- Champion compliance of BBBEE objectives

- It is necessary for communities to be organized into Community Tourism Organisations to enable it to provide a coordinated point of dialogue and derive the true benefits of tourism,
- The chairperson of the CTO must represent the CTO in the following coordinating structures, and provide quarterly reports as required by the structures:
 - Local Tourism Forum
 - Regional/District Tourism Forum and Association
 - Community Tourism Association
 - Provincial Tourism Forum
- In addition to the activities adopted in the White paper, the CTO/RTO must also play these critical operational roles:
 - Facilitate registration and monitoring all tourism products in the local area
 - Develop virtual networks to disseminate information about the local destination and get comments from the local community and the industry at large.
 - Play a role of local Publicity Association Entity in marketing, attract events and promote the local destination.
 - Create and sustain relationships with other CTOs/PTA and reputable tourism organisations, municipalities and provincial governments.
 - **Merchandising:** the CTO/RTO may sell souvenirs and other items that promote the destination.
 - **Events:** the RTO may organise and host events to generate income
 - **Exhibitions:** the RTO may organise and host exhibitions with exhibitors buying exhibition, advertising space.

Roles and functions of the existing CTOs

The existing CTOs will retain a strong component of autonomy in that they will be able to:

- Still operate their own visitor centres.
- Jointly or severally be able to promote their local tourism ware at trade and consumer shows.
- Retain their own local management committee.
- Promote and manage events as fund raising opportunities.
- Recruit new members and retain a major portion of membership fees.
- Create their own localised marketing tools with funding from the UThukela Tourism Association, and under a commonly accepted tourism branding theme.

Each will be able to nominate a representative to the UThukela Tourism Association and in so doing have an avenue to bring local issues to the attention of the UThukela DM.

Roles and functions of Local and District Municipality with regard to C.T.Os

The municipalities should ensure that the CTO:

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

5 Implementation Framework

The previous phases which make up the contextual, situational analysis and the strategic development framework have formed the basis for the current phase, the Implementation Framework. The implementation plan comprises of the final phase of the Review and Development of a Tourism Sector Strategy for uThukela District Municipality. This phase consists of the identified tourism projects emanating from the previous strategy development phase. The implementation plan also consists of a set of prioritisation principles which the identified projects will be assessed against with the aim of selecting five anchor projects to be implemented within the short term (0-5years) Once projects are prioritised and selected, a project sheet/mini business plan will be drawn up for each project which identifies the stakeholders, funding sources, budget requirements and project activities that need to take place in order for the project to be successful. The implementation plan details key performance indicators for monitoring and evaluation purposes.

The overarching aim of the implementation framework is to produce an implementation plan that will highlight potential investment areas that the uThukela District Municipality needs to focus investment to ensure sustainable and responsible tourism development.

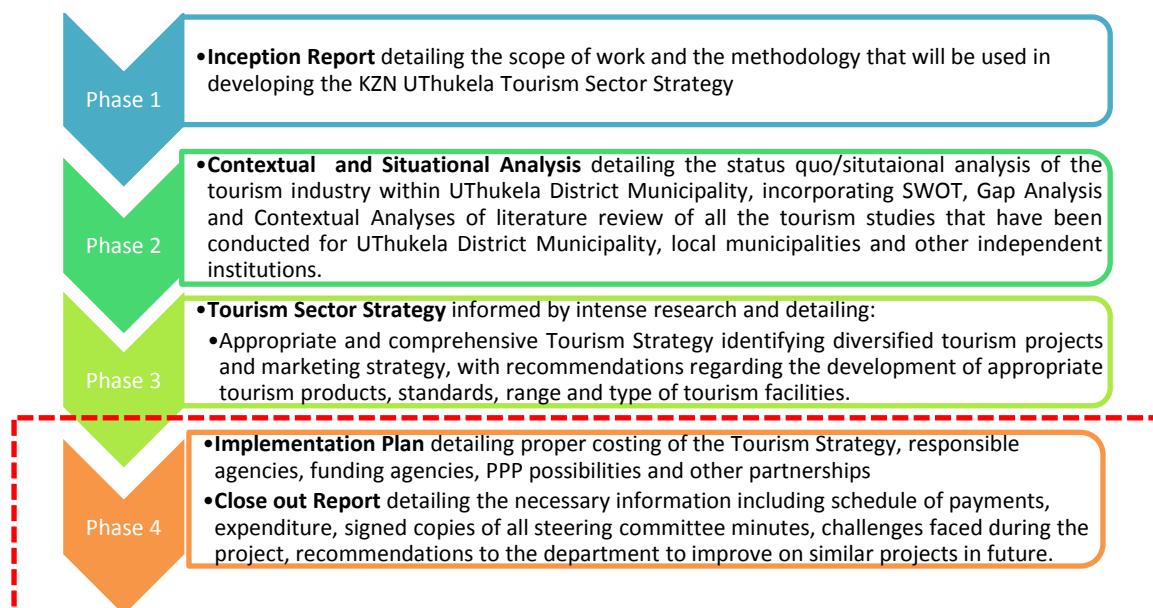
Objectives

The objectives of this phase are as follows:

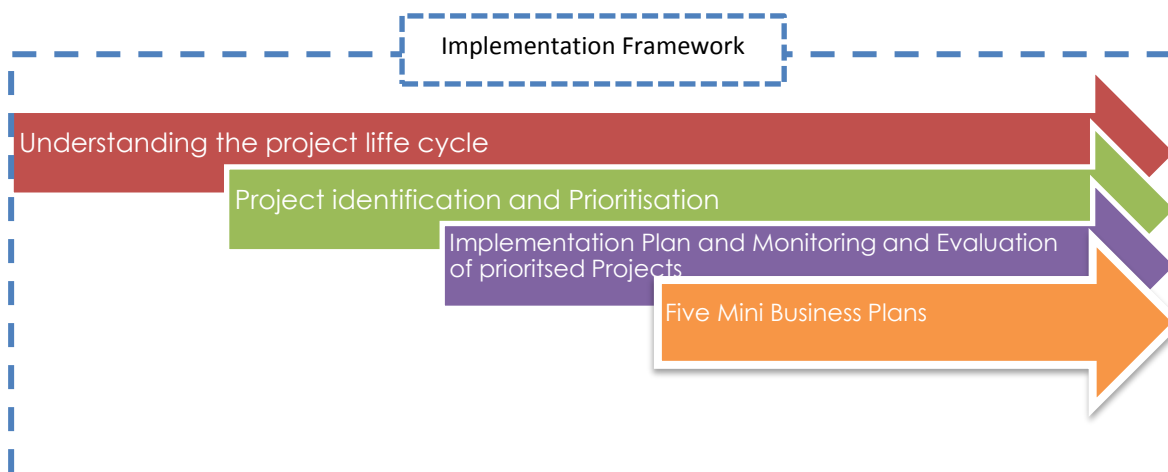
- To formulate a development and management plan as well as institutional structures relevant to achieving tourism growth in uThukela
- to determine 5 prioritised projects using prioritisation matrix in a workshop with the PSC
- To formulate prioritisation principles for projects identified
- To prioritize interventions/projects
- To formulate an implementation plan aligned to the strategic framework and informed by the situational analysis.
- To provide a monitoring and evaluation tool for each project

Methodology, Process and Structure

To this end a series of interactions with product owners, via telephone and an online survey together with personal interviews has taken place. Community engagement has taken place as required by the client. A district workshop was held on 29 February 2012 in order to aid with prioritisation of projects and has been taken into account when formulating the implementation plan. The figure below shows the process of the project and its different phases.



The structure of this section is as follows:



5.1 Project Prioritization Principles

This section identifies appropriate prioritization principles and assessment criteria against which the projects identified will be prioritized in order to gain a realistic amount of projects which can be implemented immediately to spur tourism growth and development in uThukela DM in the short term. These immediate actions will not relinquish the other identified projects but are seen as important to take place in the short term and to provide a foundation and enabling environment for future projects and increase visitor numbers. Also, due to scarce resources, capacity, time and funding, it is not possible to pursue all projects immediately. The aim of prioritization is to determine which project will have the highest impact on tourism in accordance to the criteria. The ultimate aim of this section is to identify five specific projects and detail mini business plans for each. These will be based on the following criteria. The criteria also revolve around the responsible tourism approach and principles as shown below.

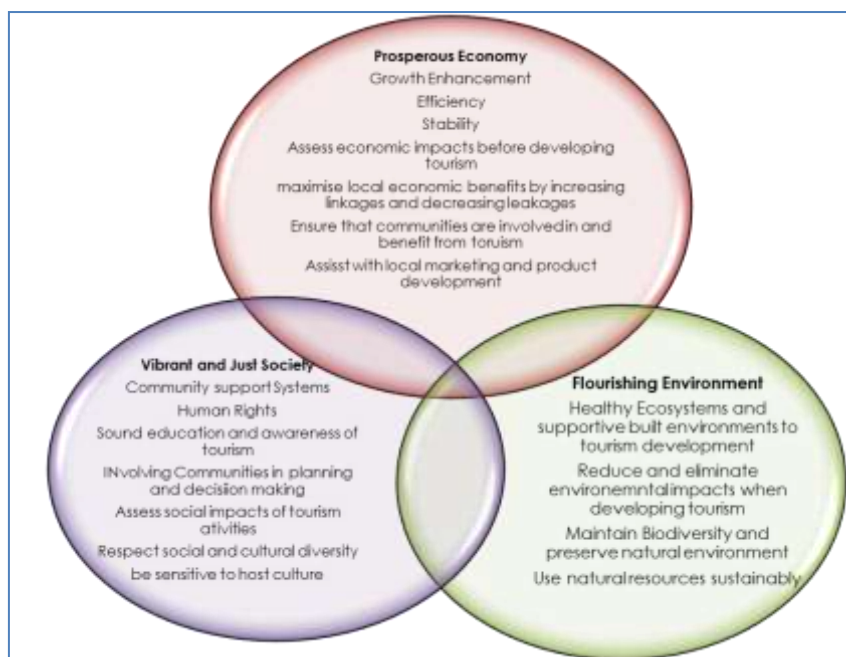


Figure 40 - Figure illustrating Sustainable and Responsible Tourism Framework (Source: Urban-Econ)

The four principles and assessment criteria are as follows below, with a brief description:

<p>• Criterion 1: Tourism and Economic Impact</p> <ul style="list-style-type: none"> Does the products jump start tourism in the area? Is the project self-sustainable? Does the product draw in a new market segment/s? Will there be a high direct volume of monthly tourists? Will there be a high direct average spend per tourist per visit? Does the project have the ability to attract other activities to the region? Does the project create and / or strengthen forward or backward linkages with other activities or sectors in order to generate a maximum multiplier effect? Does the project impact sufficiently on tourism and economic growth and development? Does the project have the potential to establish linkages with existing activities and surrounding regions? Does the project have the capacity to create multiple advantages within the region? Does the project exploit the comparative advantages (e.g. locational and resource based) of the area? Does the project have sufficient income generating potential?
<p>• Criterion 2: Transformation, Skills and Job Creation, Business Retention and Support</p> <ul style="list-style-type: none"> Does the project empower the local community through skills development and capacity building? Does the project allow for local participation and involvement in tourism projects? Does the project allow for employment creation within the tourism sector? Does the project support emerging tourism businesses? Opportunities for SMME Development?
<p>• Criterion 3: Strategic Importance for tourism in uThukela DM</p> <ul style="list-style-type: none"> Does the project align with the requirements / expectations of the local / recipient community?

<ul style="list-style-type: none"> Does the project comply with the IDP principles of the area/ NTSS and KZN Tourism Master Plan? Does the project contribute to the integration of economic spatial/nodal development Increase in the level of service availability and quality? Is there a demand for the product/service? Impact on Poverty and rural tourism development Does the project promote sustainable and responsible tourism?
<ul style="list-style-type: none"> Criterion 4: Enabling Environment
<ul style="list-style-type: none"> Does the project relate to infrastructural change and enhancement? Does the project protect the integrity of the natural environment? Does the project create an enabling environment for businesses and people?

It is important to note that priority projects are also influenced by stakeholder consultation and potential funders.

5.2 Priority projects

Based on the criteria a number of priority projects were chosen from a list of initial projects which have been identified through the strategic framework above. All identified projects are listed in Annexure 1 from which priority projects have been chosen. The chosen priority projects are listed below. In the following section an implementation plan and monitoring and evaluation framework has been completed for each of these projects. It is from this list that the six projects are chosen for purposes of completing a mini business plan, which will follow. The priority projects are as follows:

- i. 1.1.2 Create an Events Calendar and strategy for District and coordinate and lobby the use of local SMMEs to deliver for events
- ii. 1.1.4 Appoint service provider to develop a district tourism website with a data base of all attractions, and products as well as potential investments
- iii. 1.2.1 Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars
- iv. 1.2.6 Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela
- v. 2.1.1 Provide support to the upper uThukela Stewardship process - Support the development of the upper uThukela region and community conservation areas and nature reserves to allow for eco-tourism and allied initiatives
- vi. 2.1.4 Investigate the expansion and consolidation of Weenen Game Reserve and investigate potential as a Big Five Game Reserve
- vii. 2.1.5 Provide Support the restoration of Umsuluzi Game Reserve near Colenso
- viii. 2.1.7 Provide support and engage linkages to Trans-Maloti Trekking Trail and MDR
- ix. 2.1.8 Upgrade Rock Art Centres in Okhahlamba and link environmental interpretation centre
- x. 2.1.12. Investigate the development of a Cableway as an iconic signature project in line with the KZN Tourism Master Plan
- xi. 2.2.4 Investigate potential and impact for rail tourism in light of the KZN Rail tourism Feasibility study with Ladysmith as main station
- xii. 2.2.6 Identify and develop key existing and potential Township and Rural Tourism projects: modelled on the best case example of Mpophomeni
- xiii. 2.2.24 Create a themed heritage and cultural route along R74 (Mpofana – Weenen – Umsuluzi – Colenso) in according with Provincial Spatial Planning Guidelines
- xiv. 2.2.27 Support MICE tourism by packaging investment project for a conference venue in Emnambithi/Imbabazane/Okhahlamba/Escourt
- xv. 2.2.30 Support Craft and Visual Arts exhibition in partner with Dept. of Arts and Culture
- xvi. 2.3.1 Facilitate the reconstruction of the Royal Natal Hotel

- xvii. 2.3.4 Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /center
- xviii. 2.4.3 Develop an investment promotion strategy and incentives policy and package potential projects in collaboration with TIKZN
- xix. 2.5.1 Engage SAPS in tourism awareness and tourist protection in uThukela DM involving all LMs
- xx. 2.6.2 Development and promotion of universal accessibility tourism standards and apparatus and marketing of accessible tourism
- xxi. 3.1.1 Conduct a baseline study and transformation plan for uThukela Tourism with a M&E system
- xxii. 3.1.2 Facilitate continuous SMME and Business Support to tourism role-players (e.g. Crafters) through a development programme
- xxiii. 3.1.5 Develop a local procurement strategy linked to local SMMEs and local product owners and investigate Development and Retail of Arts and Crafts for export and through exhibitions in partnership with chain stores
- xxiv. 3.2.2 Facilitate a district tourism skills audit and development plan to guide and involve LMs
- xxv. 3.2.3 Create a district wide strategy for tourism education and awareness programmes (career choice perception) for interested and passionate communities and school children to be rolled out per LM (See proud Schools project) in partner with an educational institution
- xxvi. 3.2.4 Facilitate the establishment of a hospitality and tourism training and development center in the district in partner with recognized tourism training centers with satellite offices
- xxvii. 3.3.5 Develop a system of grading and standards through the Tourism Grading Council of South Africa or SATOUR and linked to CATHSSETA for all accommodation, catering and other service providers including info centres to obtain baseline, provide guidelines, and ensure compliance through an annual monitoring and evaluation system of improvements (e.g. tourism inspector)
- xxviii. 4.1.1 Facilitate and ensure continuous upgrade of R74 with Free State
- xxix. 4.1.4 Upgrade and maintain the road to Spioenkop (R181)
- xxx. 4.2.6 Develop a district wide tourism and advertising signage policy, investment and communication framework to systematically guide allocation maintenance and provision of signage (inclusive of Battlefields signage).
- xxxi. 5.1.1 Formulate a knowledge management strategy and system for collating and presenting information and visitor statistics to track demand include audit of the amount of jobs/employment figures currently occupied in all tourism related initiatives as well as revenue earned with an M/E system in place.
- xxxii. 5.1.4 Develop a district tourism information system and database of all tourism attractions and products that is constantly updated and accessible to all stakeholders and make available on proposed website
- xxxiii. 5.2.6 Project 5.2.6. Develop a Regional Tourism Organization incorporating the District Tourism Forum
- xxxiv. 5.2.10 Oversee that ALL local municipalities are equipped with a tourism official as per Provincial requirements
- xxxv. 5.3.5 Ensure that green principles are incorporated into new tourism developments and investigate incentives for the incorporation of green principles/ link to grading and award system
- xxxvi. 5.4.1. Facilitate fast tracking of planning processes (e.g. Development approval processes) as well as land auditing and land availability database to enable development to occur

5.3 Priority Projects - Implementation Plan and Monitoring and Evaluation Framework

The monitoring and evaluation framework consists of 36 of the projects listed above. These are priority projects chosen according to evaluation undertaken in the implementation framework above. The monitoring and evaluation framework provides a tool to manage and monitor the various listed projects to aid with key implementation objectives. The M&E framework consists of potential outcomes and KPIs for each of the priority projects for which to measure progress on, possible implementing agents and role players who are likely to be involved in the project as well as indicative budgets, potential funding sources and an indicative time frame. Time frames are purely indicative and will depend on the circumstances facing the district at any given moment in time, as well as availability of finance and funding approvals etc.

For purposes of priority projects and to avoid duplication of projects, projects have been combined where possible. Please note that not all projects can take place in its entirety, and relate and overlap with other project activities and outcomes. The reason for stating all possible projects with this knowledge is to emphasis the importance of all projects to ensure full representation of all potential projects.

Strategic Cluster/ Goal 1: Marketing-Develop an effective and efficient marketing system to increase visitor numbers into uThukela Marketing - tourism growth and development (demand)						Time Frame				
Strategic Thrust	Project/Intervention	Outcome / K.P.I	Implementing Agent/s	Budget	Potential Funding Source	2012	2013	2014	2015	2016
Strategy 1.1. Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution	1.1.2 Create an Events Calendar and strategy for District and coordinate and lobby the use of local SMMEs to deliver for events	Creative annual events calendar compiled with input from each LM	uThukela DM, proposed RTO, CTOs, service providers, LMs, LTFs	R 500 000	DEDT, DAC, sponsorships from businesses, RTO	✓	✓			
		3 new annual events introduced								
		Communication networks established with external events coordinators								
		Events calendar promoted, distributed and advertised in line with marketing and distribution strategy								
		Minutes of RTO meetings								
		Events strategy and plan in place								
		Procurement strategy in place								
		A minimum of 50 % of local SMMEs promoted and utilised at events								
		Funding strategy determined								
	1.1.4 Appoint service provider to develop a district tourism website (CBS Based) with a data base of all attractions, and products as well as potential investments	Website designer appointed and payment schedule agreed upon	Proposed uThukela RTO, LMs, CTOs, LTFs	R 80 000	uThukela DM, RTO		✓			
		Application development and mobile web development and social networking								
		Website created according to branding and available data bases with guidelines given from the DM to the web designer								

Strategic Cluster/ Goal 1: Marketing-Develop an effective and efficient marketing system to increase visitor numbers into uThukela Marketing - tourism growth and development (demand)						Time Frame				
Strategic Thrust	Project/Intervention	Outcome / K.P.I	Implementing Agent/s	Budget	Potential Funding Source	2012	2013	2014	2015	2016
Strategy 1.2. Ensuring branding and marketing cohesion	1.2.1 Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars	Completed marketing and distribution strategy Quarterly campaigns, seminars and road shows held, with a detailed outcomes analysis Adequate and effective marketing material produced Distribution outlets and system identified and utilised, with an M&E system in place Seasonal market segment research conducted Upgraded municipal tourism information offices, inclusive of community initiatives and creativity District brand promoted and aligned Relations with international outbound tour operators created Information districted at local service providers and attractions Engaged community marketing initiatives Area marketing project initiated through packaged experiences for tour operators Events calendar Website designed and consistently updated and linked to LM websites Nice tourism packaged in relation to core experiences Participation in international and national film and other festivals Marketing tools explored and adopted (eg. Social media such as Facebook) Communication plan with surrounding attractions and districts put in place to ensure aligned and linked marketing, (N3 Gateway, Open Africa, MDR) Route Plan implemented uThukela collective history documented and updated Indaba stand successful and fully representative form all LMs Experience based marketing ensured Become a member of N3 Gateway Number of international and national trade shows, road shows, conferences marketed at and effectiveness documented and evaluated	uThukela DM - Proposed RTO, CTOs, LTFs, LMs, TKZN	R 1.6 mil	DAC, DEDT, sponsorships from businesses,RTO	✓				
	1.2.6 Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela	Route Plan formulated and implemented 6 New route projects identified All routes identified and amalgamated All routes themed accordingly All routes mapped with GPS coordinates By monthly meeting held with all affiliated stakeholders Institutional structure in place and route participants identified Partnerships created with affiliated and surrounding tourism bodies (MDR, Open Africa, EKZNW, N3 Gateway, Amajuba)	uThukela DM proposed RTO, LMs, CTOs, LTFs, TKZN	R 350 000	DEDT, DAC, sponsorships from businesses,RTO, Open Africa, N3 Gateway	✓				

Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion						Time Frame				
Strategic Thrust	Project/Intervention	Outcome / K.P.I	Implementing Agent/s	Budget	Potential Funding Source	2012	2013	2014	2015	2016
Strategy 2.1. Develop and Grow Core tourism experiences (Nature-based and eco-tourism)	2.1.1 Provide support to the upper uThukela Stewardship process - Support the development of the upper uThukela region and community conservation areas and nature reserves to allow for eco-tourism and allied initiatives	Communication made with EKZNW	uThukela DM, EKZNW	R 100 000	KZNW, DEDT, uThukela			✓		
		Needs identified and addressed								
	2.1.4 Investigate the expansion and consolidation of Weenen Game Reserve and investigate potential as a Big Five Game Reserve	Feasibility/Business plan undertaken	uThukela DM, EKZNW	R 1 450 000	EKZNW, uThukela, COGTA		✓			
		Needs identified and addressed								
		Minutes of public meetings								
	2.1.5 Provide Support the restoration of Umsuluzi Game Reserve near Colenso	Identify Role Players and engage communication	uThukela DM, EKZNW	R 50 000	EKZNW, uThukela DM proposed uThukela RTO			✓		
		Needs and interventions identified and addressed								
		Minutes of meetings held as determined by stakeholders								
Strategy 2.2. Develop Niche Tourism Experiences (Adventure and Sport, Avitourism, Township and Rural Tourism, cultural and heritage tourism and community based tourism)	2.1.7 Provide support and engage linkages to Trans-Maloti Trekking Trail and MDR	Communication and active involvement established	uThukela DM, MDRF	R 100 000	uThukela DM		✓			
		Support identified and implemented								
	2.1.8 Upgrade Rock Art Centres in Okhahlamba and link environmental interpretation centre	Needs analysis undertaken and addressed	uThukela DM, Okhahlamba LM, EKZNW	R 2 000 000	TIKZN, DEDT, IDC			✓		
		Feasibility study undertaken to link environmental interpretation centre								
	2.1.12. Investigate the development of a Cableway as an iconic signature project in line with the KZN Tourism Master Plan	Feasibility study completed and way forward determined	uThukela DM, DEDT, private stakeholders, Okhahlamba LM	R 500 000	DEDT			✓		
	2.2.4 Investigate potential and impact for rail tourism in light of the KZN Rail tourism Feasibility study with Ladysmith as main station	Feasibility study/Business plan undertaken	uThukela DM	R 350 000	DEDT, COGTA, IDC, DTI, uThukela DM		✓			
	2.2.6 Identify and develop key existing and potential Township and Rural Tourism projects: modelled on the best case example of Mpophomeni	Completed Feasibility study/Business plan	uThukela DM	R 350 000	DEDT, uThukela DM		✓			
	2.2.12 Ensure preservation, maintenance of Battlefields sites	Percentage of Sites Upgraded and Maintained	uThukela DM, LMs, AMAFA, Battlefield Route Association	R 1 000 000	uThukela DM, LMs, AMAFA, Battlefield Route Association	✓	✓	✓	✓	✓
	2.2.24 Create a themed heritage and cultural route along R74 (Mpofana – Weenen – Msuluzi – Colenso) in according with Provincial Spatial	Feasibility study/Business plan undertaken	uThukela DM - District Tourism Entity (RTO) (destination marketing)	R 300 000	COGTA, DEDT, uThukela DM			✓		
		Route aligned to proposed route plan and institutional structures								
	2.2.27 Support MICE tourism by packaging investment project for a conference venue in Emnambithi/Imbabazane/Okhahlamba/Escort	Completed Feasibility study/Business plan	uThukela DM	R 200 000	TIKZN, DEDT, IDC			✓	✓	
		Location determined and Completed construction of conference centre								
	2.2.30 Support Craft and Visual Arts exhibition in partner with Dept. of Arts and Culture	Supporting Needs identified and addressed	Dept. of Arts and Culture	R 600 000	DAC/DEDT/uThukela DM	✓	✓	✓		

Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion						Time Frame				
Strategic Thrust	Project/Intervention	Outcome / K.P.I	Implementing Agent/s	Budget	Potential Funding Source	2012	2013	2014	2015	2016
Strategy 2.3. Tour Operating services, hospitality and accommodation	2.3.1 Facilitate the reconstruction of the Royal Natal Hotel	Full EIA to be completed Complete financial feasibility and business plan	EKZNW, uThukela DM	R 30 000	uThukela DM, DEDT, EKZNW			✓		
	2.3.4 Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /center	Feasibility study/Business plan undertaken and location determined	uThukela DM	R 5 500 000	uThukela, TIKZN, DAC, IDC, DEDT, COGTA					
		Craft centre constructed								
		Management and operational plan in place								
		M&E system in place								
		Identify satellite tourism information centres in Indaka and Imbabazane								
		Information centre constructed in accordance with VIC strategy					✓	✓	✓	
		Procure passionate and qualified staff and procure SMMEs to conduct business within the vicinity in accordance with Procurement strategy and Craft and Visual exhibition in conjunction with DAC								
		Support provided to Craft and Visual exhibition in conjunction with DAC by holding exhibitions and events								
		Promoted and exposed district craft and tourism hub through adequate marketing								
Strategy 2.4. Ensure Investment promotion of tourism in uThukela	2.4.3 Develop an investment promotion strategy and incentives policy and package potential projects in collaboration with TIKZN	Investment promotion strategy complete potential tourism projects packaged	uThukela DM uThukela DM	 R 500 000	 DEDT, COGTA, uThukela		✓			
Strategy 2.5. Enhance safety and security in the district to support crime free tourism in uThukela	2.5.1 Engage SAPS in tourism awareness and tourist protection in uThukela DM involving all LMs	Safety and Security Plan drawn up and implemented by SAPS Number of campaigns held annually and crime stats monitored	uThukela DM, SAPS	R 600 000	uThukela, LMs, SAPS				✓	
Strategy 2.6. Enhance safety and security in the district to support crime free tourism in uThukela	2.6.2 Development and promotion of universal accessibility tourism standards and apparatus and marketing of accessible tourism	Status quo of tolerance of accessible tourism in uThukela and needs and gaps identified and addressed Standards identified and implemented in at least 50% of attractions through incentive related methods of encouragement Provision made for accessible infrastructure at public attractions Integrated marketing of accessible tourism through district destination marketing M&E system in place and operational	uThukela	R 200 000	DTI, uThukela DM, LMs				✓	

Strategic Cluster/Goal 3: People Development- To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence						Time Frame				
Strategic Thrust	Project/Intervention	Outcome / K.P.I	Implementing Agent/s	Budget	Potential Funding Source	2012	2013	2014	2015	2016
Strategy 3.1. Encourage and ensure transformation of the uThukela tourism industry	3.1.1 Conduct a baseline study and transformation plan for uThukela Tourism with a M&E system	Percentage of black owned SMMEs represented on CTO's and district forums	uThukela DM, LMs	R 500 000	DEDT, uThukela DM, COGTA			✓		
		Percentage of black female/ black/accessibility challenged owned enterprises								
		Major businesses selected and buy in gained for purposes of mentoring through an incentive scheme								
		Skills audit and needs assessment completed and employment equity figures determined and goals set								
		Enforcement of BEE compliant incentives								
		Full compliance with BEE Charter and Scorecard								
		Support programmes for previously disadvantaged rolled out								
		Number of campaigns held annually								
		Number of SMME tourism projects related to rural tourism development identified								
	3.1.2 Facilitate continuous SMME and Business Support to tourism role-players (eg. Crafters) through a development programme	Development programme/support strategy formulated with a needs assessment	uThukela DM, LMs	R 600 000	uThukela DM, DEDT, LMs				✓	✓
		Location from which to administer support through support desks identified(Support provided at the tourism hub								
		Support information distribution to SMMEs and co-ops facilitated								
		M&E and feedback system implemented								
		Constantly updated database								
		Percentage of SMMEs with access to funding, infrastructure, advertising and representation								
		Number of training workshops, seminars held								
	3.1.5 Develop a local procurement strategy linked to local SMMEs and local product owners and investigate Development and Retail of Arts and Crafts for export and through exhibitions in partnership with chain stores	Language barrier addressed	uThukela DM, LMs	R 500 000	uThukela DM, LMs, DAC, DTI				✓	
		Procurement strategy in place								
		Potential linkages of retail of arts and craft identified and feasibility and business plan drawn up								
		Retail of SMME products with sustained turnover and capacity								

Strategic Cluster/Goal 3: People Development- To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence						Time Frame				
Strategic Thrust	Project/Intervention	Outcome / K.P.I	Implementing Agent/s	Budget	Potential Funding Source	2012	2013	2014	2015	2016
Strategy 3.2. Foster a tourism culture through tourism awareness and education across the district	3.2.2 Facilitate a district tourism skills audit and development plan to guide and involve LMs	Skills audit and needs assessment completed	uThukela DM, LMs, CTOs, LTFs	R 200 000	uThukela DM, LMs			✓		
	3.2.3 Create a district wide strategy for tourism education and awareness programmes (career choice perception) for interested and passionate communities and school children to be rolled out per LM (See proud Schools project) in partner with educational institution	Strategy completed and implemented	uThukela DM, LMs, educational institutions	R 900 000	Dept. of Education, DEDT, uThukela DM, LMs					
		Skills audit and needs assessment completed								
		Number of campaigns held annually								
	3.2.4 Facilitate the establishment of a hospitality and tourism training and development centre in the district in partner with recognised tourism training centres with satellite offices	Defined set of actions to be agreed upon and evaluated and monitored by annually	uThukela, Dept. of Education	R 20 000 000	Dept. of Education, DEDT, uThukela DM, LMs, National Lottery, IDC			✓	✓	✓
		Role players identified								
		Feasibility study and business plan completed								
		Hospitality educational centre established								
	Potential satellite offices identified									
Strategy 3.3. Ensure Quality Experiences and service excellence	3.3.5Develop a system of grading and standards through the Tourism Grading Council of South Africa or SATOUR and linked to CATHSSETA for all accommodation, catering and other service providers including info centres to obtain baseline, provide guidelines, and ensure compliance through an annual monitoring and evaluation system of improvements (eg. tourism inspector)	Unified grading measure identified	Service providers, CTOs, uThukela DM,	R 210 000	uThukela DM, LMs, CTO			✓		
		guidelines distributed to businesses with incentives								
		70% of businesses abide to grading standards								
		M&E system in place								
Strategic Cluster/Goal 4: Tourism Infrastructure Investment Framework-To create a favourable built tourism environment to become conducive to growth and development and to boost investor confidence						Time Frame				
Strategic Thrust	Project/Intervention	Outcome / K.P.I	Implementing Agent/s	Budget	Potential Funding Source	2012	2013	2014	2015	2016
Strategy 4.1. Maintain and upgrade Transport (road, air and rail) and Services infrastructure to create a conducive tourism environment	4.1.1 Facilitate and ensure continuous upgrade of R74 with Free State	Communication with Free State and R 74 upgraded to allow for through traffic	Free State, uThukela DM	R 2 000 000	Dept. of Transport	✓				
	4.1.4 Upgrade and maintain the road to Spieonkop (R181)	R 181 upgraded to an acceptable condition	uThukela DM, Okhahlamba LM, Dept of Transport	R 700 000	uThukela DM, Okhahlamba LM, Dept of Transport	✓				
Strategy 4.2. Maintain and facilitate provision of Signage to direct visitors in and around uThukela	4.2.6 Develop a district wide tourism and advertising signage policy, investment and communication framework to systematically guide allocation maintenance and provision of signage in line with existing Signage Strategy (eg. forthcoming MDR Signage Strategy) and inclusive of Battlefields signage	Signage Policy Completed and implemented	Dept. of Transport, uThukela DM	R 600 000	uThukela DM, Dept. of Transport		✓			
		Linkages made with MDR signage strategy								

Strategic Cluster/Goal 5: Policy, strategy, governance, research & knowledge management monitoring and evaluation- To create an enabling institutional environment through knowledge management, developing collaborative partnerships and producing planning and regulatory measures						Time Frame				
Strategic Thrust	Project/Intervention	Outcome / K.P.I	Implementing Agent/s	Budget	Potential Funding Source	2012	2013	2014	2015	2016
Strategy 5.1. Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry	5.1.1 Formulate a knowledge management strategy and system for collating and presenting information and visitor statistics to track demand include audit of the amount of jobs/employment figures currently occupied in all tourism related initiatives as well as revenue earned.	Strategy formulated and system in place	uThukela DM, LMs, tourism service providers	R 300 000	DEDT, IDC, COGTA, uThukela DM, LMs					
		Role players identified								
		Buy in obtained from all role players/service providers/LMs to implement and adhere to system formulated								
		District database in place to collate all info obtained by role players					✓	✓		
Strategy 5.1. Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry	5.1.4 Develop a district tourism information system and database of all tourism attractions and products that is constantly updated and accessible to all stakeholders and make available on proposed website	M&E system in place to ensure compliance and to analyse information	uThukela DM, LMs, tourism service providers	R 200 000	n/a					
		Analysis and updating of information seasonally								
		Database of all service providers and attractions completed and updated seasonally								
		Constantly updated database available to the public on the proposed website and potential marketing material					✓			
Strategy 5.2. Enhance tourism through institutional arrangements, collaborative partnerships, communication and policy	5.2.6 Develop a Regional Tourism Organization incorporating the District Tourism Forum	RTO established and agreement signed and forum operational	uThukela DM, service providers, LMs, CTOs, LTFs, Battlefields Route Association	R 4 000 000	n/a		✓			
		Constitutions drawn up and implemented								
		Identify local municipalities with difficulty formulating a LTF and assist with support								
		Identify local municipalities with difficulty formulating a LTF and assist with support								
Strategy 5.3. Promotion of responsible tourism and green principles in tourism development	5.3.5 Ensure that green principles are incorporated into new tourism developments and investigate incentives for the incorporation of green principles/ link to grading and award system	Green Principles for new development determined	uThukela DM, LMs, CTOs, LTFs, service providers	R 250 000	uThukela DM, CTOs					
		Incentives investigated and determined and linked to grading system								
		Awareness created through seminars and campaigns								
		Green principals marketed to service providers								
Strategy 5.4. Provide a sustainable Planning framework to guide and fastrack future tourism development and investment	5.4.1. Facilitate fast tracking of planning processes (eg. Development approval processes) as well as land auditing and land availability database to enable development to occur	Monitoring and Evaluation system in place	uThukela DM, LMs	R 200 000	n/a					
		Planning processes related to tourism development prioritised through speedy planning processes								
		Land constantly audited and land availability determined								
		Land constantly audited and land availability determined					✓	✓	✓	✓

5.4 UThukela Tourism Performance Indicators

The following table provides baseline values and targets as key tourism indicators in uThukela DM with estimated projections of future tourism development to be used as a monitoring and evaluation tool to track progress of tourism development in uThukela. These indicators are based on baseline data derived from the NTSS and KZN Master Plan where values were given for South Africa and KZN, they have been included. The estimated baseline figures presented for uThukela DM have been derived from various sources which are described in the table, however, in many cases values could not be derived due to lack of information. This lack of information is critical to the success of the tourism sector in uThukela DM. Therefore it is noted that it is necessary to gather information in order to form accurate indicators and targets which indicate demand for tourism and could also indicate growth trends and characteristics. The projections in the table below are based on the current growth rate of tourism in uThukela DM and envisaged increases in the growth of the tourism sector. Where there is no baseline data available, the data needs to be researched as per the strategy recommendations.

Assumptions: Initial GVA growth rates indicated 3.65 % per annum, projected growth rates used are at 5 % per annum, current employment growth rate is – 1.76% per annum, it is envisaged that employment figures grow to produce positive growth rates at 3 % per annum.

Focus	Measure	National & Provincial baseline values (2009/10)	2015 target	2020 target	uThukela baseline values (2010)	uThukela 5 year target (2015)	uThukela 10 year target (2020)	Source of indicator value
GDP	Direct GDP impact	National: R71,4 bn (3% of GDP)	R118,4 bn	R188 bn (2,9% of GDP)	R 188 mn (2 % of district total GVA)	R 240.6 mn	R 307.0 mn	Based on values for catering & accommodation sector only (Source: Quantec Regional Data, 2010)
		Provincial: R22bn		R65,2bn (R40,4bn 2009 Rands)				
	Direct & Indirect GDP impact	National: R189,4 bn (7,9% of GDP)	R318,16 bn	R499 bn	R 342.2 mn	R 437.9 mn	R 558.9 mn	National Input-Output table (Urban-Econ, 2010)
		Provincial: R33bn		R98,4bn (R60,66bn 2009 Rands)				
Visitor/Trip Numbers	Foreign	National total: 9 933 966	2068030	15000000	162 967 visitors	207992 visitors	265456 visitors	Urban-Econ estimates based on TKZN number of visitors to the Battlefields and Drakensberg
		Provincial total: 1 213 001		2 095 410				
	Domestic	National Total: 14 600 000	16000000	18000000	349 860 Trips	446520 trips	569885 Trips	
		Provincial Total: 8 800 000		16 301 935				
Employment	Direct	National: 389 100	403 900	461 700	2968 people	3441 employed	3989 employed	Employment in the catering & accommodation sector (Quantec regional data, 2010)
		Provincial: 100 000		183 820				
	Direct and Indirect	National: 919 800	968 300	1 097 000	4544 people	5268 employed	6107 employed	
		Provincial: 133 000		244 480				

Investment	Public	National: R82,4 bn	R100 bn	R118 bn	no baseline data available			Investment data can be gathered from building plans approved and amount spent on new tourism projects in uThukela DM
	Private	no baseline data			no baseline data available			
	Foreign Direct	National: R3 bn	R3.8 bn	R4 bn	no baseline data available			
Transformation	No of companies with a BEE scorecard	no baseline data available	70% of charter compliance		no baseline data available	70%		It is recommended that this information is gathered through CTOs or tourism bodies. Alternatively, a survey can be conducted annually
	No of companies with high level accreditation	no baseline data available			no baseline data available	80%		
	Number of companies reaching tourism charter targets	no baseline data available			no baseline data available	80%		
	Number of black majority owned companies	no baseline data available			no baseline data available			
Rural Tourism demand	Number of visitors to rural businesses	no baseline data available			no baseline data available			Information should be gathered at each rural attraction and accommodation facility
	Number of attractions in rural areas	no baseline data available			no baseline data available			Information to be gathered through CTO
Number of bed nights in low season months	Foreign	National: 15.80%	21.10%	25%	no baseline data available			Occupancy information needs to be gathered from every accommodation place available uThukela DM
	Domestic	National: 5.30%	7.10%	10%	no baseline data available			

Visitor Experience	Number of visitors whose experience meets or exceeds their expectations	no baseline data available			no baseline data available			Service excellence survey, or customer satisfaction cards is necessary to gather this information.
Awareness	increased levels of awareness of tourism and its value	no baseline data available			no baseline data available			This can be assessed in future through surveys as well as investment.
	Increase in levels of community participation	no baseline data available			no baseline data available			
Events & MICE market growth	Number of events > 1000 people	no baseline data available			no baseline data available			Requires district level co-ordination of events
	Economic Impact Assessment of Events	no baseline data available			no baseline data available			Requires economic impact surveys
	Number of meetings and conferences	no baseline data available			no baseline data available			Each conference venue to provide data
Niche Market Growth	Number of visitors per niche market	no baseline data available			no baseline data available			Data to be gathered by niche markets and made available to uThukela DM

6 Indicative Cash Flow

The indicative cash flow provides an indicative yearly budget breakdown per priority project. The table below is a summary of the indicative budgets needed to implement projects. The table below is broken down into funds which would need to be allocated from a district budget and from outsourced funding. The indicative budgets and cash flow presented in the table are only calculated for the priority project list. Please see Annexure for the detailed cost breakdown for each priority project. Budgets allocated for the DM are understood to be indicative of what amount is actually needed to manage tourism adequately in uThukela. However should the yearly amount for the district responsibility be too high for available funding, money is to be lobbied and outsourced to carry through allocated tasks. Currently the tourism budgets as per IDP allocation is too low for much improvement on the District side however, increases need to come through from Province and National which are in process through the recent KZN Tourism Master Plan. Some amounts may indicate on costs for facilitation as the details needs of a project are not known at this stage, once facilitation takes place, and specific needs are identified per project, additional budgets would need to be sourced or made available.

Indicative Cash Flow per Financial Year Summary per Strategic Cluster													
Strategic Cluster	Yearly Budget Breakdown (DM Responsibility)						Yearly Budget Breakdown (Outsourced Funding)						Total 5 year Budget (DM + Other)
	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (DM)	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (Outsourced)	
*Strategic Cluster 1 Marketing	R 490 000	R 610 000	R 410 000	R 410 000	R 110 000	R 2 530 000	R 0	R 0	R 0	R 0	R 0	R 0	R 2 530 000
Strategic Cluster 2: Product Development and Support Services	R 640 000	R 1 590 000	R 650 000	R 700 000	R 950 000	R 4 530 000	R 500 000	R 150 000	R 3 950 000	R 1 850 000	R 1 850 000	R 8 300 000	R 12 830 000
Strategic Cluster 3: People Development	R 750 000	R 40 000	R 1 240 000	R 940 000	R 440 000	R 3 410 000	R 0	R 1 000 000	R 9 000 000	R 7 000 000	R 2 500 000	R 19 500 000	R 22 910 000
Strategic Cluster 4: Tourism Infrastructure Investment Framework	0	0	R 600 000	0	0	600000	2000000	700000	0	0	0	2700000	R 3 300 000
Strategic Cluster 5: Policy, strategy, governance, research & knowledge management monitoring and evaluation	R 370 000	R 420 000	R 70 000	R 195 000	R 195 000	R 1 250 000	R 20 000	R 1 470 000	R 770 000	R 770 000	R 770 000	R 3 800 000	R 5 050 000
Total	R 2 250 000	R 2 660 000	R 2 970 000	R 2 245 000	R 1 695 000	R 12 320 000	R 2 520 000	R 3 320 000	R 13 720 000	R 9 620 000	R 5 120 000	R 34 300 000	R 46 620 000
*The marketing budget does not include indicative budgets for potential projects coming out of the proposed marketing strategy and projects that are not within the priority list of projects.													

7 Proposed uThukela DM Tourism Spatial Development Plan

This section provides a conceptual spatial plan for uThukela Tourism. It is based on the maps described below and informed by the PGDS, 2011, Provincial Spatial Development Framework as well as the uThukela DM Spatial Development Framework and exiting information gathered.

7.1 Provincial Spatial Development Framework

The map below shows uThukela in relation to the KZN Provincial Spatial Development Framework. The Spatial Development Framework of the PGDS recognises Escourt and Ladysmith as tertiary nodes at a provincial scale which are defined as centres which should provide service to the sub-regional economy and community needs. It also recognises Winterton and Bergville as centres which should provide service to the sub-regional economy and community needs. The conservation corridor forms a major part of the SDF (as shown below) and is intended to be protected areas with continuous ecosystems and biodiversity and have been identified by Ezemvelo KZN Wildlife. They are important for eco-tourism and can therefore generate economic activity such as tourism development.

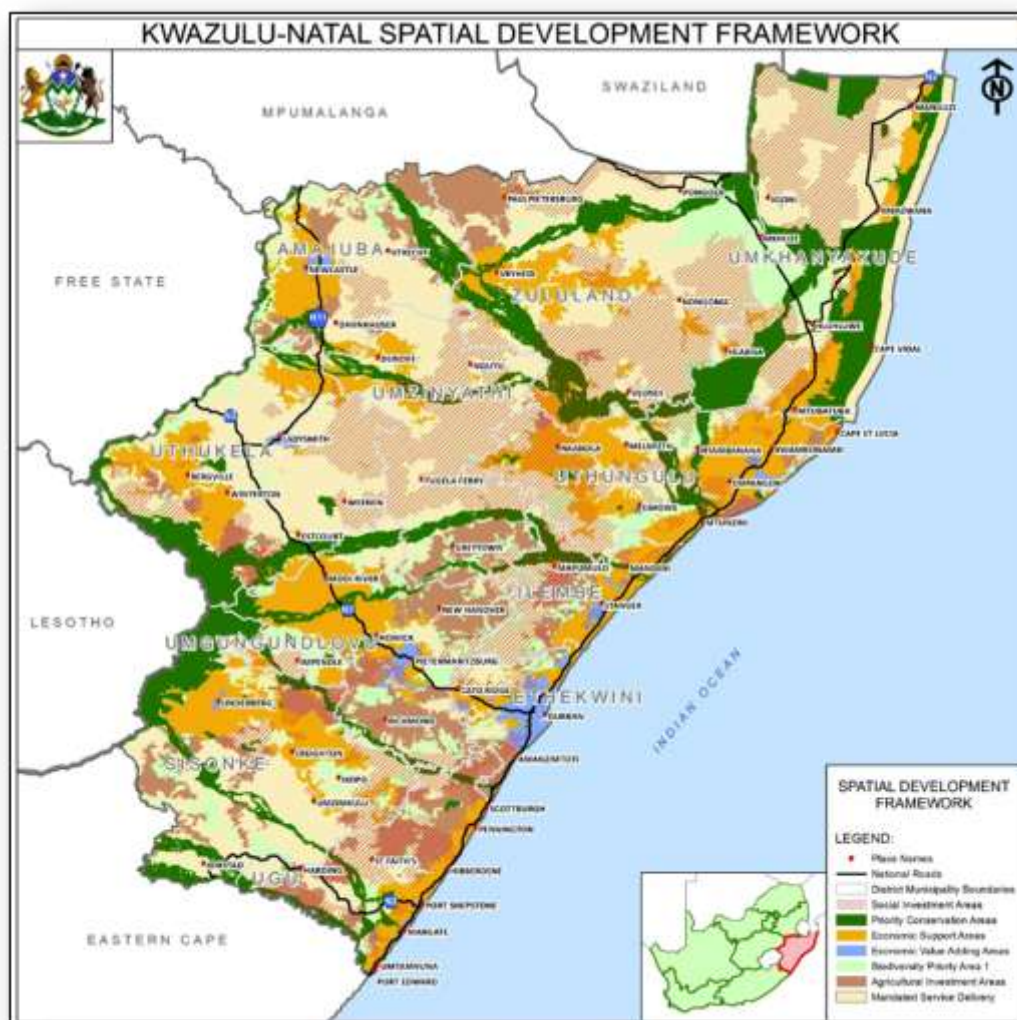


Figure 41 – KZN Provincial Spatial Development Framework (Source: PGDS, 2011)

The two maps below illustrate the Provincial Spatial Development Framework elements as well as the key intervention areas as they relate to the uThukela District Municipality specifically.

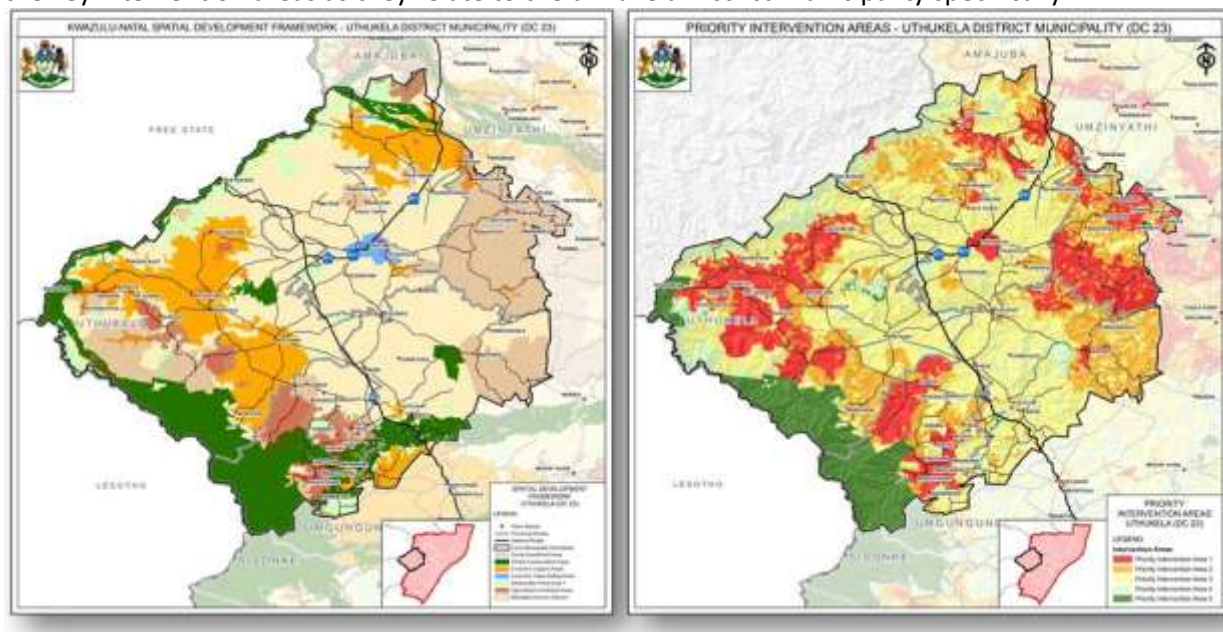


Figure 42 - KZN Spatial Development Framework: uThukela District Municipality (Source: PGDS, 2011)

In promoting growth and development within the uThukela District as well as supporting the proposed spatial structure and areas in need of intervention, the following provincial catalytic projects are envisaged within the district by the PGDS, 2011:

- Rapid Transit Rail (Speed Rail)
- Tugela Dam
- Nature Based Tourism
- Industrial Support Services
- Eco, Battlefields & Cultural Heritage Tourism Routes
- Agro-Processing incorporating Bio-Fuels
- Industrial Regeneration
- Small Town Regeneration
- Rural Service Centres
- ECD Centre Development
- Centres for the Disabled
- Centres for Senior Citizens
- Substance abuse Rehabilitation Centres
- School Greening

This is also linked to the Biodiversity priority areas. Conservation tourism is identified as serving priority. The land uses identified are as follows:

7.2 UThukela Spatial Development Framework (SDF), 2011

The uThukela DM SDF identifies a primary tourism corridor and a series of secondary tourism corridors concentrated in the Okhahlamba and Imbabazane LMs. Reason being that the UKhahlamba-Drakensberg World Heritage Site lies within these LMs. The current tourism sector strategy identifies uThukela as needing a diverse spatial spread of activities, recognising the World Heritage Site as a key anchor. Tourism activities and tourism potential investment areas need to be geographically spread to include all LMs. Geographic spread will allow for the benefits of tourism to

reach a wider range of service providers and communities. The strategy focuses on ensuring the geographic spread of tourism with more emphasis towards supporting tourism growth in rural areas, in particular with more involvement of rural communities as aligned to the NTSS. In order to achieve a more equal distribution of tourists across the district, increase the share of bed nights and exposure of other inherent tourism activities. A diverse geographical spread will enhance the supply of rural tourism products that attract customers and earn revenue.

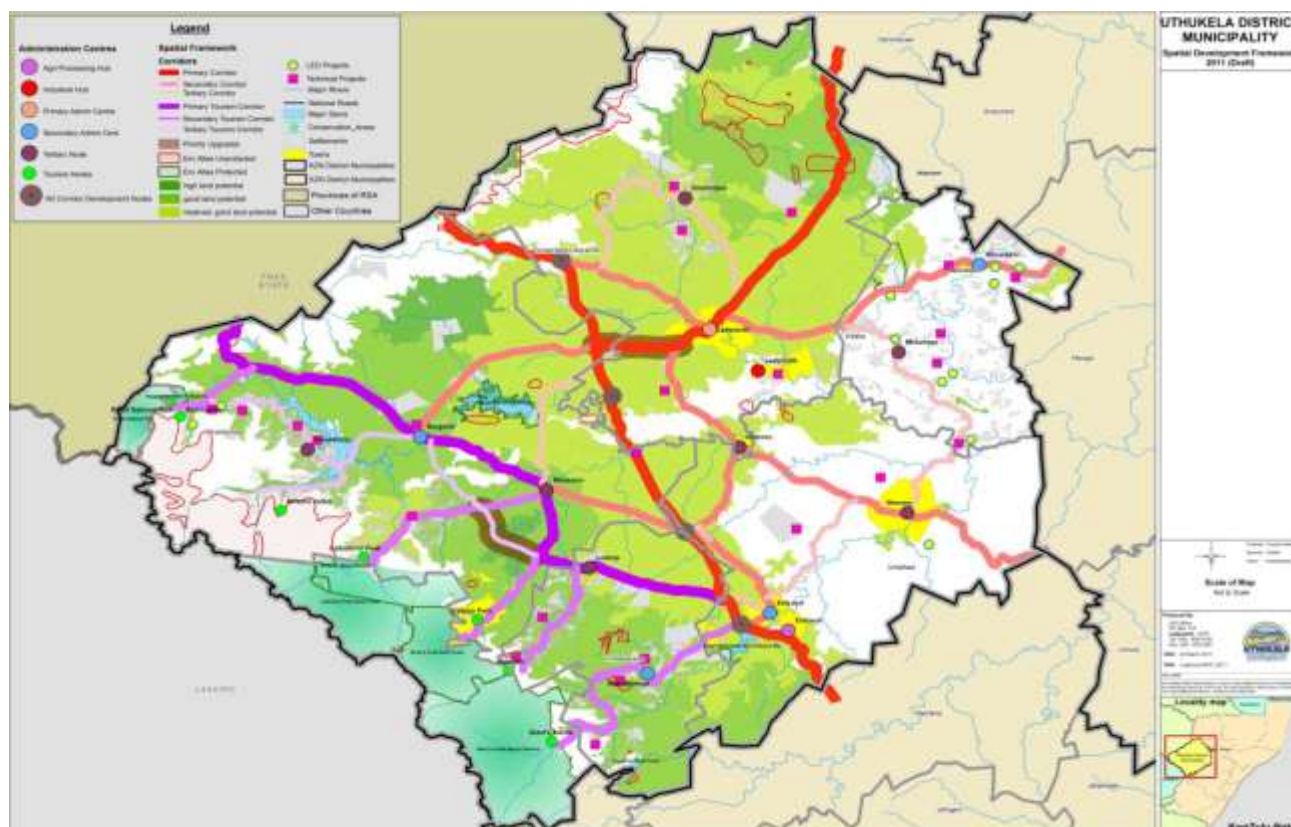


Figure 43 - uThukela Spatial Development Framework (Source: uThukela IDP, 2011/2012 Review)

7.3 UThukela DM Proposed Tourism Spatial Development Plan

In developing the tourism spatial development plan a host of aspects need to be taken into account which will be discussed before presenting the proposed tourism spatial plan. The issues discussed are:

- Cross Boundary Linkages
- Existing concentration of activities
- Environmentally protected areas
- Existing tourism information centres
- Geographic spread of tourism

7.3.1 Cross Boundary Linkages

The map below illustrates the linkages to the surrounding regions and the table below explains the strategic importance of linkages identified. These cross boundary linkages and main entry access points into the district indicates the level of accessibility into the district and inherent potential to make possible tourism linkages to other regions with the intention of strengthening tourism provincially and locally. Institutionally this link and communication is made through the various

tourism structures proposed and the standardised institutional structure as discussed in the institutional framework above. It is however important that uThukela DM recognises the cross boundary linkages and potential to engage meaningful relationships and actively involving the district in cross boundary agendas for example, the Maloti-Drakensberg Route. A key international linkage to be emphasised is through the **Maloti Drakensberg Trans Frontier Conservation Area** and **Maloti-Drakensberg Route** which is of international and national imperative. Other key linkages are to the Battlefields in Amajuba and uMzinyathi DMs, and the Midland Meander in uMgungundlovu DM. Another key cross boundary linkage is to the Free State via the R74 which is a major thoroughway for tourists coming from Free State and Gauteng. Also the inherent tourist attractions as shown on the map increase the desirability to maintain a cross boundary linkage which could potentially strengthen tourism in the Free State and uThukela. There are current community initiatives which need to be explored via Golden Gates National Park and Sterkfontein Dam Nature Reserve. The corridor from Pomeroy to Majaqula attempt to link Indaka with areas across uMzinyathi and have potential to serve as major tourist access routes to the Zulu Culture and Heritage Route. Both the LED and IDP highlight the potential tourism projects.

Main Access Routes	Strategic Importance
N3	<ul style="list-style-type: none"> Major passenger and freight route linking main economic centres of Gauteng and Durban, Sustained through traffic, Linkage to uMgungundlovu DM in the south and Free State to the north of uThukela, N3 Gateway affiliation and institutional arrangements geared toward tourism. Key tourism nodes linkage: Midlands Meander in uMgungundlovu DM
N11	<ul style="list-style-type: none"> Major alternate route to Gauteng through uThukela, Link from uThukela to Amajuba DM.
R 74	<ul style="list-style-type: none"> Major link to Free State through Okhahlamba LM Link to Sterkfontein Dam Nature Reserve Linkage to uMzinyathi DM through uMtshezi LM
R 103	<ul style="list-style-type: none"> Link to Midlands Meander Tourism node, Important inter-district link leading to R74 and joining the N3.
R 600	<ul style="list-style-type: none"> Inter-district link from N11 through Winterton to Bergview
R 616	<ul style="list-style-type: none"> Important link from R74 in Okhahlamba to N11 leading to Emnambithi

Figure 44 - Table showing the strategic importance of the main access routes (Source: Urban-Econ)

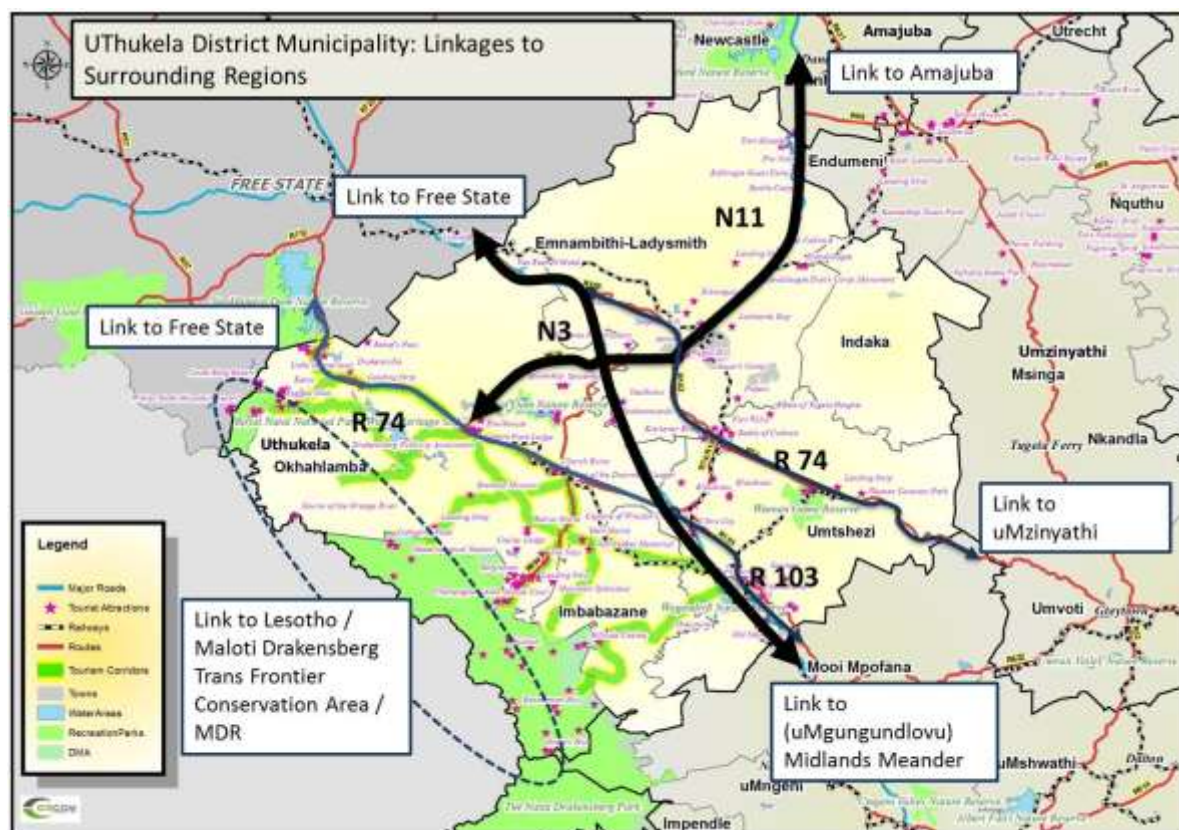


Figure 45 - Map showing linkages to surrounding national and international regions (Source: GIS Com and Urban-Econ)

7.3.2 Existing concentration of activities

The map below shows the key existing concentration of tourism attractions across the district. It is important to know the key areas where there is existing tourism potential and activity. This will aid in deciphering specific intervention areas and to create a geographical spread of future investment. The map below shows that Okhahlamba has the most existing tourism activity taking place, followed by Imbabazane, uMtshezi and Ennambithi. Indaka has limited existing tourism attractions. Key areas of existing activities are highlighted on the map below.

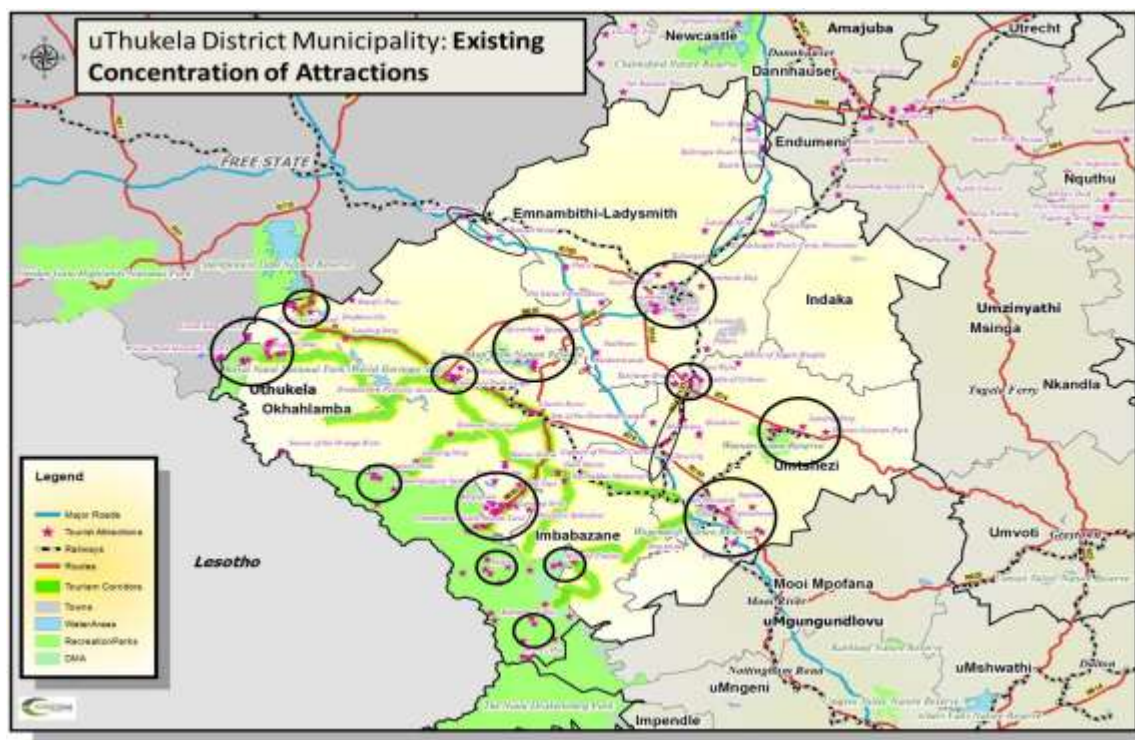


Figure 46 - Map illustrating the existing concentrations of attractions (Source: GIS Com and Urban-Econ)

7.3.3 Environmentally Protected Areas

The map below depicts the environmentally protected areas and renowned recreation parks in uThukela, which are managed by Ezemvelo KZN Wildlife. These are the Royal Natal National Park, uKhahlamba Drakensberg World Heritage Site, Spioenkop Dam Nature Reserve, Wagendrift Dam Nature Reserve and Weenen Game Reserve. The map also shows areas where future planning for conservation need to take place as indicated by the PGDS, 2011 SDF and the Biodiversity Plan prepared for uThukela.

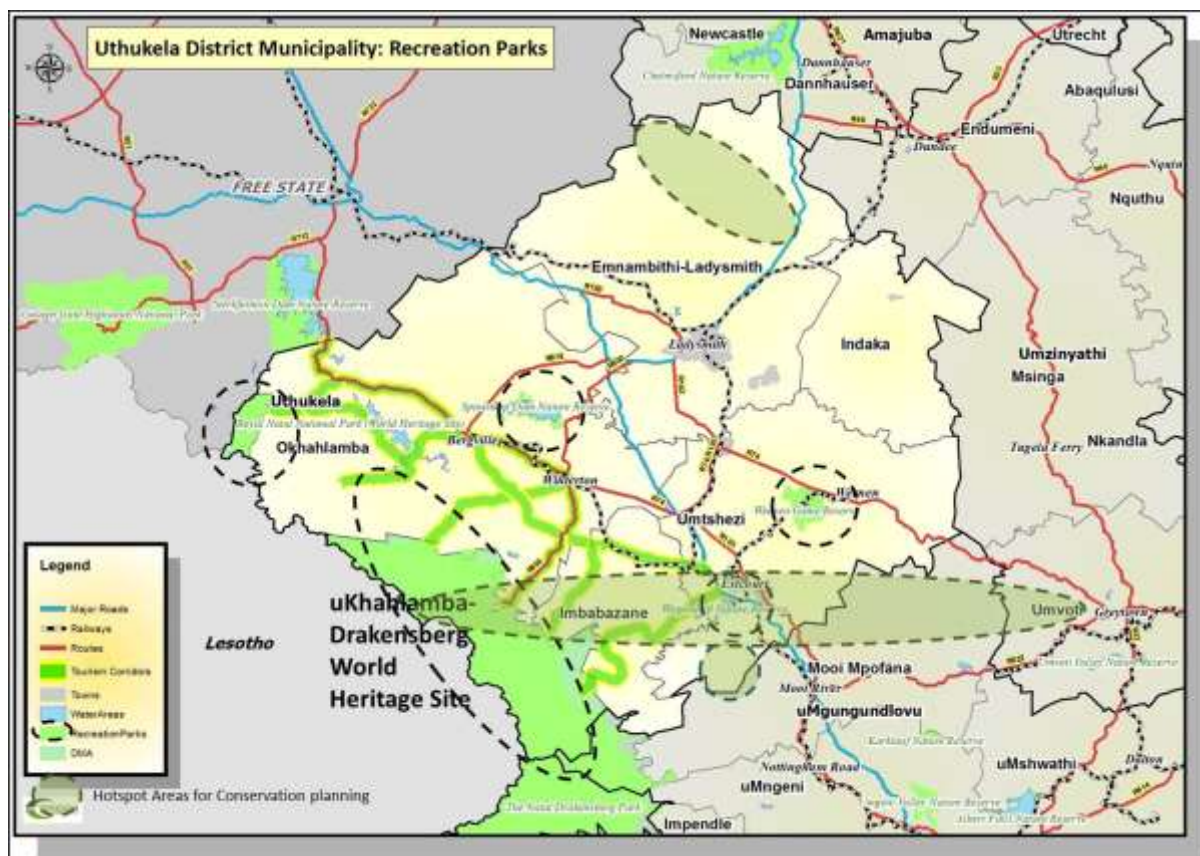


Figure 47 - Map illustrating existing recreation parks and areas of significance of future conservation planning (Source: GIS Com and Urban-Econ)

7.3.4 Existing Tourism Information Centres

The map below depicts spatially the existing admin centres in uThukela which is detailed in the list provided below.

Ladysmith	Industrial Hub	Ladysmith	Primary Admin Centre
Ekuvukeni	Secondary Admin Cent	Estcourt	Secondary Admin Cent
Estcourt	Agri-Processing Hub	Busingatha	Tourism Nodes
Bergville	Secondary Admin Cent	Mnweni Valley	Tourism Nodes
Ntabamhlope	Secondary Admin Cent	Driefontein	Tertiary Node
Giant's Castle	Tourism Nodes	Mhlumayo	Tertiary Node
Injisuthi	Tourism Nodes	Weenen	Tertiary Node
Cathedral Peak	Tourism Nodes	Loskop	Tertiary Node
Royal National Park	Tourism Nodes	Winterton	Tertiary Node
Cathkin Park	Tourism Nodes	Colenso	Tertiary Node
Kwadakuza	Tertiary Node		

The existing tourism information centres are shown spatially as well. These are mainly public owned with one being privately owned, that is, the Central Drakensberg Information office. The public owned information offices are located within Estcourt, Ladysmith, Winterton and Bergville.



Figure 48 - Map illustrating existing tourism information centres (Source: Urban-Econ and GIS Com)

7.3.5 Geographic Spread of types of tourism

The map below depicts the potential types of tourism per local municipality which has been influenced by the individual characteristics of each LM as identified in the Situational Analysis. As shown on the map below there is potential for a vast range of tourism activities throughout the district. Some intervention areas with regard to arts and craft tourism and rural/township tourism which includes community based tourism are indicated for Indaka. The types of tourism relate both to inherent potential and existing types of tourism within these LMs which make them eligible for further intervention in these areas. At all times, it must not be forgotten that the World Heritage Site is present and is an anchor which could be utilised to spur related tourism.

Emnambithi, Okhahlamba, Imbabazane and uMtshezi have potential for Culture/Heritage tourism, Nature based tourism (which includes adventure and sports tourism, avi-tourism, and rail tourism), rural/township/community based tourism, Arts and Craft and business tourism, whereas Indaka has potential for Arts and Craft and Rural/Township/Community based tourism.

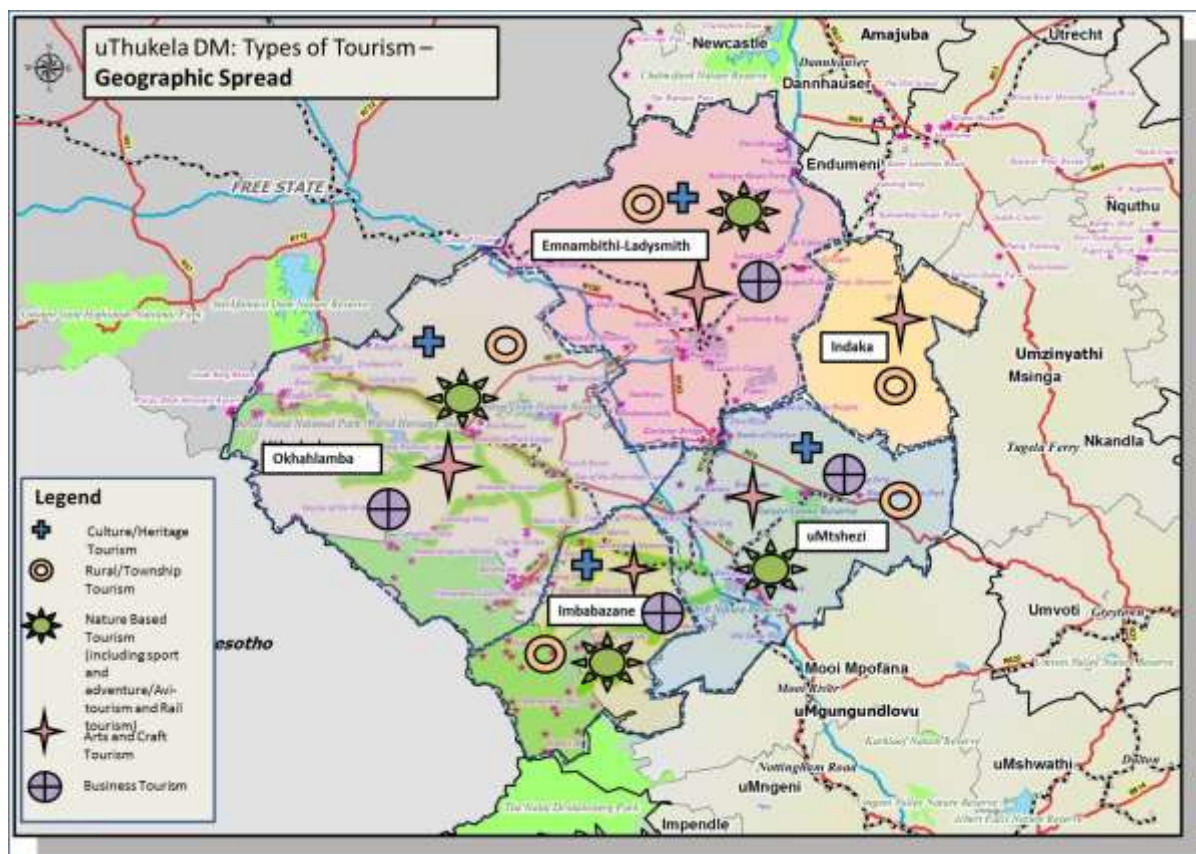


Figure 49 – Map illustrating the geographic spread for the types of existing and potential tourism (Source: Urban-Econ)

7.3.6 UThukela DM Proposed Tourism Spatial Development Plan

Below is a proposed spatial development plan for tourism in uThukela DM taking into account the existing tourist attractions and existing potential for tourism intervention. The composite map below shows proposed tourism nodes and corridors for uThukela DM and amalgamates the previous maps and information presented to form a distinct and overarching spatial plan for tourism in uThukela DM. The table following the map aims to explain the map legend.

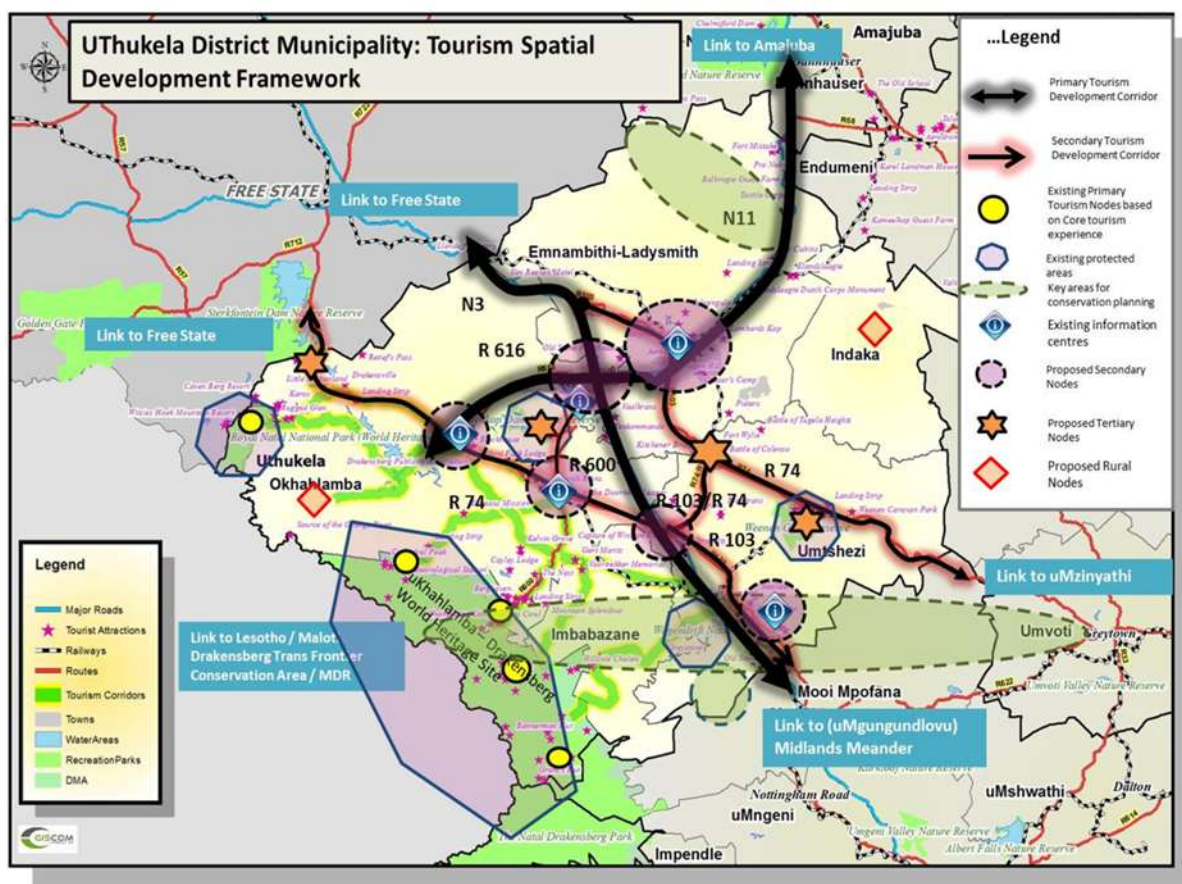


Figure 50 - Map illustrating a proposed tourism spatial plan for uThukela District Municipality (Source: Urban-Econ)

Table 16 - Table explaining the proposed spatial development Plan above and implied connotations (Source: Urban-Econ)

Key	Description
Proposed Primary Tourism Development Corridors	N3/N11: These movement routes allow for increased potential tourists traversing the district and provide the perfect opportunity to become routes along which tourism development occurs. This is already evident with existing attractions along the N11 and N3. Future tourism projects are suggested to be located along these development corridors or at intersections, projects such as a district craft centre and tourism hub as it is easily accessible along these routes.
Proposed Secondary tourism development corridors	R103, R 74, R 600, R 616: These main district roads will aid with integration and enhance the uThukela tourist experience through culture, heritage and scenic routes with economic opportunities. Future development is recommended to be positioned along these development corridors in order to optimise development potential.
Existing Primary Tourism Nodes	These nodes have previously been identified as they are primary nodes lying in the UKhahlamba - Drakensberg World Heritage Site which draw a vast amount of tourists to the district due to its inherent nature based (e.g. Scenery, birding, adventure) and culture/heritage (eg. San Rock Art) tourism. These nodes need to be monitored to assess infrastructure needs etc. to ensure sustained tourism development. Linkage between these nodes also needs to be supported through integration of land between Royal Natal National Park and UKhahlamba – Drakensberg Park through consolidation of community owned land.

Proposed Secondary Tourism Nodes	These nodes have been proposed due to the existing concentration of attractions as highlighted above. Interventions identified are recommended to be established at these important tourism centres including upgrading of tourism sites, signage provision and service provision as these serve as main tourist centres.
Proposed Tertiary/Rural Tourism Nodes	Development is supported at these nodes as potential exists at these nodes for future tourism development and intervention which is also advocated in the Provincial Spatial Guidelines of 2009 (See Annexure). These nodes provide for important district linkages and main concentrations along tourism routes.
Key areas for conservation planning	The PGDS and Biodiversity plan for uThukela identifies these conservation corridors and areas for future conservation planning. As stated by the PGDS, 2011, 'these Conservation Corridors are not suggested as absolute "no-go" areas, but rather highlighted as areas of environmental significance to the sustainable development of the entire province. Where economic opportunity (such as tourism development) and high social need exist within these Conservation Corridors, it implies both that the rich natural environment should contribute to the address such needs and potential, and further that any interventions in these areas need to consider the impact on such important regional ecological corridors. These corridors are however perceived as areas where extensive densification would be discouraged and sensitive development promoted'.
R74 Mpofana - Weenen – Umsuluzi – Colenso as a primary corridor	This corridor has been identified and prioritised as a cultural tourism route by COGTA and is seen to have a vast developmental impact on tourism and surrounding communities and is seen to have high scenic value. This corridor provides a link from uMzinyathi and Mooi Mpofana.
R616 Spioenkop Battlefield – Bergville – Mnweni – R600 Spioenkop Nature Reserve as secondary corridors	These routes have been identified by COGTA as a case study the concept of associative cultural landscapes as a procedure for the integration of cultural heritage resources into the spatial planning process and particularly, the potential of cultural heritage resources for tourism development and wider community participation in this sector.

7.3.7 Potential Investment Areas

With reference to the spatial plan proposed above, the map below depicts potential investment areas for tourism in uThukela. The purpose of the map is to show the intended future spatial spread of tourism activity to include all areas in uThukela. Tourism needs to benefit and trickle down to all communities, and communities need to become aware and conscious of tourism in their regions. It is recommended that future tourism investment be directed in proposed tourism nodes and corridors. The map below shows inclusivity and equality of tourism in all areas of uThukela DM, however this will depend on many factors. The map also shows traditional land ownership. As indicated, communities need to be integrated into the tourist system and socio-economic opportunities need to be enhanced to reach all and also as a platform for transformation of the tourism industry. Currently there are existing community tourism initiatives, however community tourism and rural/township based tourism needs to be enhanced as there exists potential and demand for this type of tourism which will have multiplier effects on surrounding and involved communities.

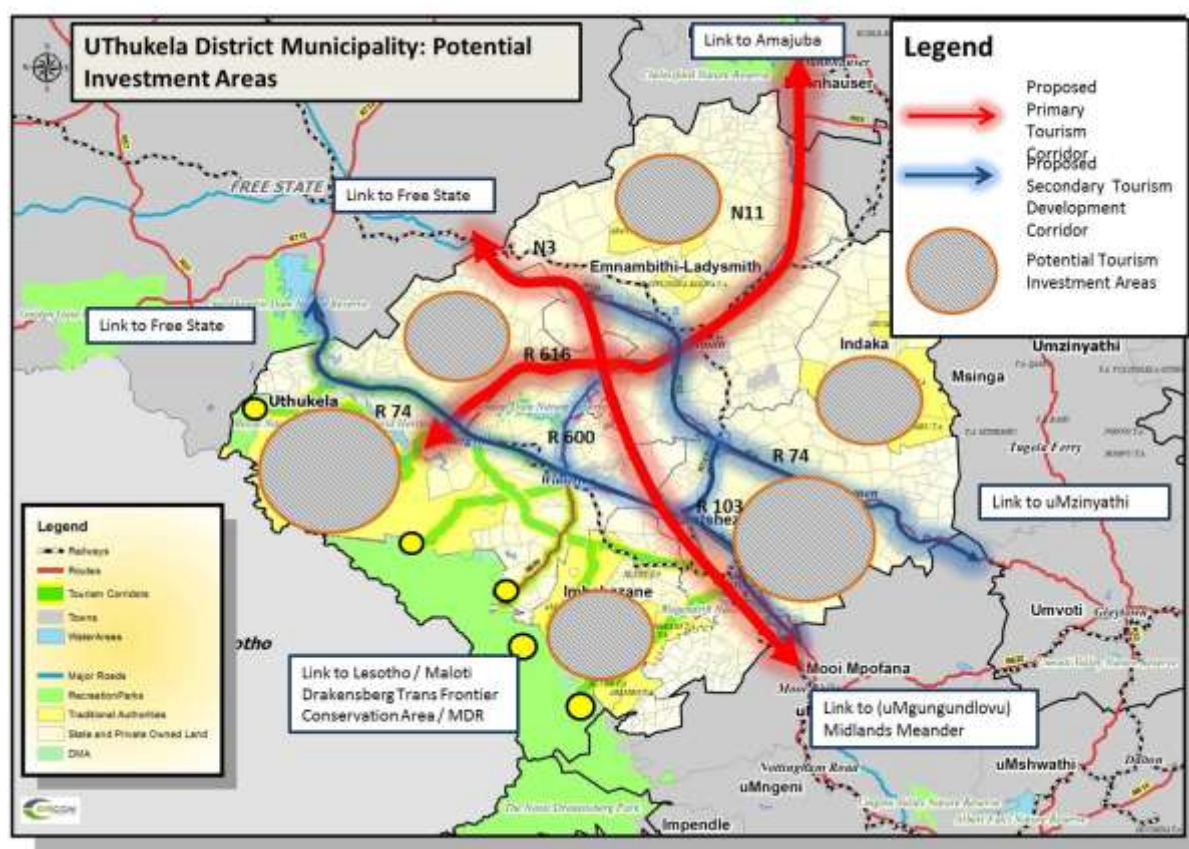


Figure 51 - Map illustrating the potential investment areas (Source: Urban-Econ)

7.3.8 Locating Projects

A defining factor in tourism development is choosing the most appropriate location. Once the project to be implemented has been identified, land identification is imperative. This will entail checking land availability and ownership. Just over 30% of land is owned by traditional authorities and a proposed project has been to identify land availability and ownership through constant land audits and updates. The location choice is made by considering⁵¹:

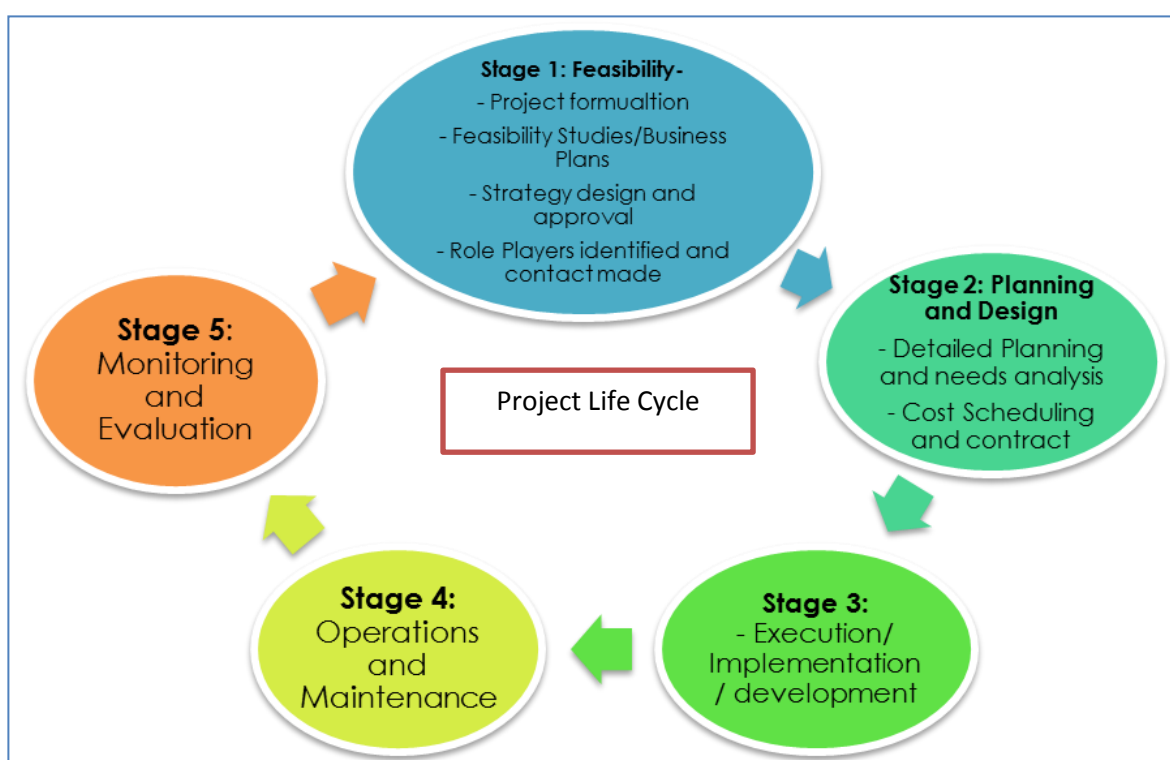
1. What is the cost of the land?
2. Where is the target market?
3. Where are the inputs sourced from?
4. What resources are available in that area e.g. water, labour-force?
5. Is transport available?
6. Is there a network of access routes?
7. What is the already-existing activity in that area?
8. Is there a possibility of aligning or complementing already-existing programmes?

⁵¹ With reference to Urban-Econ: Jozini Tourism Development Strategy 2010

8 Priority Project Concept Plans

8.1 Understanding the project life cycle

It is imperative to understand the project life cycle when implementing or planning projects. It is common for example, for a building to be constructed and then is left non-operational. To avoid waste of efforts and failing projects, the project life cycle needs to be understood. Each project is unique and intense with a series of actions that need to take place to achieve desirable outcomes as illustrated in the figure below.



This section consists of the six concept plans which were chosen from the priority list that are due for immediate implementation and will unlock tourism in uThukela DM. It must be noted that these are not the only projects that must solely be implemented within the five year cycle, the other priority projects must also be implemented in conjunction with these. These concept plans, include identification of key on-site activities; basic project implementation (budget, timeframes and champions) planning; sustainability and transference of skills as well as the identification of possible funding sources. The six projects chosen, that was work shopped, and circulated for comments are as follows:

- 1) Project 1.2.1. Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars
- 2) Project 1.2.6. Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela
- 3) Project 2.3.4 Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /center

- 4) Project 3.2.4 Facilitate the establishment of a hospitality and tourism training and development center in the district in partner with recognized tourism training centers with satellite offices
- 5) Project 5.2.6. Develop a Regional Tourism Organization incorporating the District Tourism Forum
- 6) Project 2.1.12. Investigate the development of a Cableway as an iconic signature project in line with the KZN Tourism Master Plan

8.2 Project Name: Project 1.2.1. Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives, and campaigns, and seminars

8.2.1 Project Background and Purpose

UThukela DM has proved to retain a variety and diverse mix of tourism products (avi-tourism, rural tourism, sport and adventure tourism, arts and craft, nature based, culture and heritage etc.) which need to be synergised to reach full potential through collective marketing. UThukela is rich in tourist attractions, and has a world renowned attraction lying at its doorstep with intense history and a defined culture (Drakensberg and Battlefields) providing an anchor for the promotion of other experiences offered in the district. There a varied potential cross boundary linkages and marketing with N3 Gateway, Amajuba, UMzinyathi, Midlands Meander, Maloti-Drakensberg Route, Van Reenen etc. which need to be fostered and explored to achieved a strengthened tourist system, through inclusive marketing.

UThukela is fortunate to have key anchor attraction, the nature based UKhahlamba-Drakensberg World Heritage Site and cultural and heritage based Battlefields. With this in place marketing needs to promote the diverse and unique mix of tourism, anchored on these key attractions and at the same time advertise all possibilities to suit the different target market segments.

A major challenge facing tourism in uThukela is the unequal, disorganised and fragmented marketing of tourism products, which is a contributing factor to the uneven and fragmented growth in the tourism sector in the district. One of the key issues arising from stakeholder consultation, and was a constant refrain throughout the development of the uThukela Tourism Strategy, is the need for **a coordinated and improved marketing strategy**. Fragmented marketing indicates that not all tourism products and attractions are receiving adequate attention in uThukela which impact on the demand for tourism.

It has also been identified that distribution efforts are inadequate which results in inadequate exposure of the tourism products within uThukela DM; this too will also be addressed through this strategy. Often brochures are developed and remain in boxes without getting distributed which indicate a need for a distribution plan to coordinate and provide direction for ways of distributing marketing material. Also, a more varied form of marketing needs to take place with more role-players involved, using different mediums and making use of low and high technology options. This strategy hopes to achieve these aspects to bridge the gap of inefficient marketing. It is not very effective to only provide information when a visitor is in the district; we need to work to get people into the district from key entry points and key sources through effective and widespread marketing. There is a need for a district website and other places of advertising such as television, travel magazines etc.

Marketing should promote and market uThukela's varied experiences and tourism activities e.g. wedding destinations, culture, nature based, rural, adventure, arts and craft tourism, MICE tourism etc. market and brand varied tourism experiences using existing draw cards such as Ladysmith Black Mambazo, Drakensberg, Battlefields and Drakensberg Boys Choir to interest people in the district. It is important to note that communities and local business should also be involved in marketing and advertising. Tourism experiences are not packaged and are seen as an intervention in this strategy. Events are a major draw card to the district and this need to be enhanced and coordinated through published events calendar. There is limited branding and

brandable image of the district which this strategy also addresses as well as advertising through the web. The marketing strategy will take this into account however, it is important enough to be mentioned as a standalone project to place emphasis on its importance. A district brand needs to be enforced and all tourism services and product need to belong to and use this form of branding on all marketing material.

The aim of this strategy is to create a synergy and good working relationship with the major marketing bodies and create a comprehensive marketing strategy as well as to foster route development as a major marketing tool and draw card.

Marketing is central to the institutional structures therefore a core thrust that uThukela needs is a strong and united tourism marketing action integrating the diverse attractions and experiences into a unified message aimed at attracting domestic and international tourists. This aspect will have to work in collaboration with the marketing and distribution strategy in order to achieve a plausible outcome. In order to achieve this unified approach to the marketing of the district a strong, unified and integrated institutional and organisational structure is required, which is recommended through the uThukela DM strategy. Once this structure is in place, a comprehensive short-long term strategy is needed to guide marketing investments and directive in order for the district as a whole to follow in order to not duplicate efforts and to provide a collective and forceful marketing image.

The purpose therefore of this strategy is create a strategic direction and implementable marketing intervention with regard to tourism marketing tools and methods, uniform branding and distribution interventions with the intention of positioning uThukela DM as a prime, renowned tourist destination which attracts the targeted market segments.

A key aspect to incorporate would be the integrated marketing of the key anchor tourism products, that is, the UKhahlamba-Drakensberg World Heritage Site, and the Battlefields, these attractions should not be seen in isolation but must complement one another. The major issue to be addressed with regard to the formulation of this marketing strategy is to re-position uThukela in terms of the strategy as an international and domestic destination that brings nature (the Berg) and history / culture (the Battlefields) together and thereby becomes a more holistic tourism destination. The major components that need to be addressed by the marketing strategy are:

- i. The branding and image of the district's tourism in line with the national (NTSS) and provincial (KZN Tourism Master Plan) guidelines and branding (please refer to the marketing guidelines have been provided by the uThukela Tourism Strategy 2012)
- ii. The identification of the most effective marketing and communication/distribution mechanisms i.e. websites, brochures, TV, newsletters etc.
- iii. This however also implies that there needs to be a good understanding and statistics on the market segmentation, that is, which market segments are best and cost effective reached by what mechanisms – this then relates to the Knowledge Management and research strategies identified as projects through the uThukela Tourism Strategy 2012.



8.2.2 Project Scope / Description

This strategy will provide a framework for marketing, advertising and distribution throughout uThukela DM in the short and medium term with essential monitoring and evaluation tools in place to track progress and applicability over a period of time. An indication of some of the outputs of this strategy will include the following:

- Completed marketing and distribution strategy
- Quarterly campaigns, seminars and road shows held, with a detailed outcomes analysis
- Adequate and effective marketing material produced
- Distribution outlets and system identified and utilised, with an M&E system in place

- Seasonal market segment research conducted and relevant marketing material identified and mainstreamed
- Upgraded municipal tourism information offices, inclusive of community initiatives and creativity
- Destination branding promoted and aligned throughout the district (to include concepts such as brand equity, image, identity, personality, brand management etc.). Image and branding need to be aligned to National and Provincial policy guidelines.
- Relations with international outbound tour operators created
- Information districted at local service providers and attractions
- Engaged community marketing initiatives
- Area marketing project initiated through packaged experiences for tour operators
- Events calendar and strategy
- Website designed and consistently updated and linked to LM websites
- Nice tourism packaged in relation to core experiences
- Participation in international and national film and other festivals
- Marketing tools explored and adopted (e.g. Social media such as Facebook)
- Communication plan with surrounding attractions and districts put in place to ensure aligned and linked marketing, (N3 Gateway, Open Africa, MDR)
- Route Plan implemented
- uThukela collective history documented and updated
- Indaba stand successful and fully representative form all LMs
- Experience based marketing ensured with alignment to branding
- Become a member of N3 Gateway
- Number of international and national trade shows, road shows, conferences marketed at and effectiveness documented and evaluated

The diagramme below provides an example of the varied channels for distribution and marketing promotion which need to be fostered.

Figure 2. Mapping the marketing promotion and distribution channels.

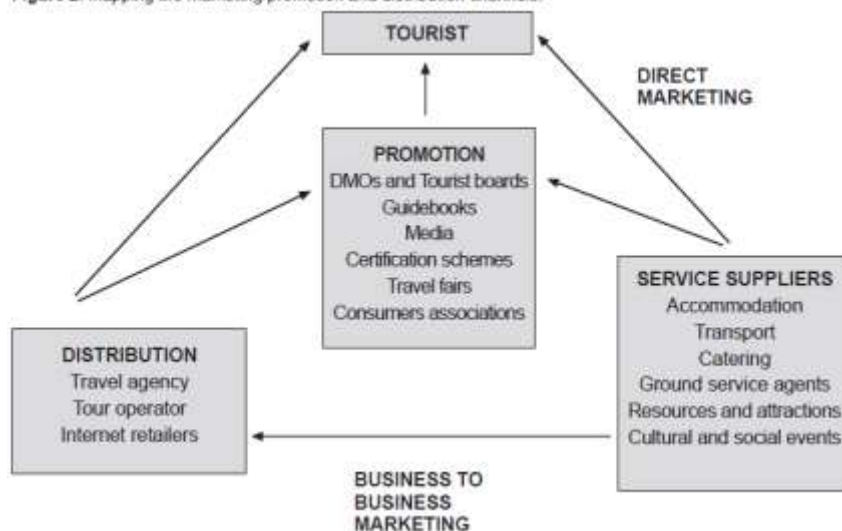


Figure 52 – Marketing Sustainable Tourism Products (UNEP, 2005)

8.2.2.1 Legal Framework

- National Tourism Sector Strategy
- TKZN Tourism Strategy
- KwaZulu-Natal Planning and **Development Act, 1998 (Act No.5 of 1998)**
- **National Environmental Management Act No 62 of 2008**

8.2.3 Activities to be undertaken and Anticipated Outcomes

- Stakeholders and role players need to be identified and roles and responsibilities established
- Funding needs to be solicited for the development of the strategy
- A service provider needs to be appointed to undertake the strategy if the proposed RTO does not have the capacity.
- Strategy must be implemented and all LMs to engage
- Monitoring and evaluating system needs to be developed and implemented

The ultimate outcome of this project is a comprehensive Marketing and Distribution Strategy for uThukela DM.

Step	Task	Key Performance Indicators	Implementing Agent
1	Identify key role players to partner with and involve in the process (Maloti-Drakensberg Route, Midlands Meander, Battlefields, Central Drakensberg Information Office, other tourism offices, CTOs, local service providers, LMs, DEDT, TKZN, SAT, EKZNW, development agencies, Chamber of Commerce, AMAFA etc.)	Role Players Identified	uThukela DM
2	Source funding	Funding secured	
3	Write Terms of Reference and conduct a tender process	TOR formulated	
4	Appoint a service provider	Service provider appointed	
5	Implement and manage the formulation of a feasibility study from initiation to completion through monitoring and evaluation tools such as PSC meeting	<ul style="list-style-type: none"> Number of PSC meetings held Marketing and distribution strategy complete 	
6	Implement the final product	Key projects identified through the Marketing and Distribution strategy implemented and an M&E system developed	

8.2.4 Envisaged SMME development and Transformation potential

Marketing has a direct impact on local SMMEs and transformation as it entails exposure of all tourism related activity in previously disadvantaged areas. Often marketing of upcoming SMMEs and tourism related activity in rural areas is unequal and development hampered due to this. Marketing aids in empowering communities through involvement, representivity and promotion of emerging tourism developments and entrants into the industry. Developing tourism in rural areas increases participation of the poor and brings wider benefits, for instance, involving ownership and management.

8.2.5 Role Players

uThukela DM, service providers, all tourism associations, proposed RTO, CTOs, LMs, TKZN, DEDT, DAC, sponsorships from businesses, Maloti-Drakensberg Route, Midlands Meander, Battlefields, Central Drakensberg Information Office, other tourism offices, SAT, EKZNW, development agencies, Chamber of Commerce, AMAFA.

8.2.6 Indicative Budget/ Cash flow and Timeframe

Please note that the amount estimated in the first year is for the strategy formulation itself (R 200 000). Thereafter a budget estimate is provided per year for marketing equity initiatives, such as web page, brochures etc. Additional budgets for the potential projects that are to come out of the strategy will have to be added to annual budgets as and when the need arises and funding if not available, will have to be sourced as recommended through the proposed strategy.

Yearly Budget Breakdown (DM Responsibility)					
2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (DM)
R200 000 (3 months)	R 500 000	R 300 000	R 300 000	R 300 000	R 1 600 000
Linkage to other projects	This project is linked to all projects identified directly and indirectly but specifically to all projects in Strategy 1.1 and strategy 1.2				

8.2.7 Conclusion

It is imperative that this strategy be formulated and implemented more importantly as lack of marketing cohesion and duplication of efforts coupled with unequal marketing initiatives prove to be detrimental to the tourism industry in uThukela DM. Lack of sufficient and coordinated marketing and branding results in limited exposure of all the tourism products that the district has to offer.

The major issue to be addressed with regard to the formulation of this marketing strategy is to re-position uThukela in terms of the strategy as an international and domestic destination that brings nature (the Berg) and history / culture (the Battlefields) together and thereby becomes a more holistic tourism destination. The major components that need to be addressed by the marketing strategy are:

- i. The branding of the district's tourism
- ii. The identification of the most effective marketing and communication/distribution mechanisms i.e. websites, brochures, TV, newsletters etc.
- iii. This however also implies that there needs to be a good understanding and statistics on the market segmentation, that is, which market segments are best and cost effective reached by what mechanisms – this then relates to the Knowledge Management and research strategies identified as projects through the uThukela Tourism Strategy 2012.

8.3 Project 1.2.6. Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela

8.3.1 Project Background and Purpose

"The route is a way of pulling people to where tourism needs to do its magic. So they take the money magic and you exchange it for experience magic. That's what a route is. It is the magic of the tourism dollars and the magic of the tourism experience."(McLaren, 2011)

UThukela is rich in tourist attractions, and has a world renowned attraction lying at its doorstep with intense history and a defined culture (Drakensberg and Battlefields) providing an anchor for the promotion of other experiences offered in the district. UThukela has good infrastructure leading to the district which increases accessibility and flow of traffic through the region. There a varied potential cross boundary linkages and marketing with N3 Gateway, Amajuba, UMzinyathi, Midlands Meander, Maloti-Drakensberg Route, Van Reenen etc. which need to be fostered and explored to achieve a strengthened tourist system.

The need for a coordinated and single district tourism route stems from the loose standing existing and potential routes that are evident in uThukela and challenges associated with management, marketing, operationalization etc. A planned route will aid with management and marketing coordination of local attractions. This will also ensure collective marketing of routes. Route development has been identified as a priority in uThukela due to the inherent economic and strategic tourism impact as well as the ability to ensure inclusivity of rural areas and communities. UThukela has many ad hoc tourism routes and planned route opportunities; however institutional structures are not in place to support development. There is some confusion surrounding individual routes with individual branding and marketing. The purpose of a route plan is to pool all existing and potential routes together to be marketed as a single district route to ensure cohesion and integration as well as to reach a wider target audience and enable exposure for the entire district as well as enhance pro poor tourism and economic development.

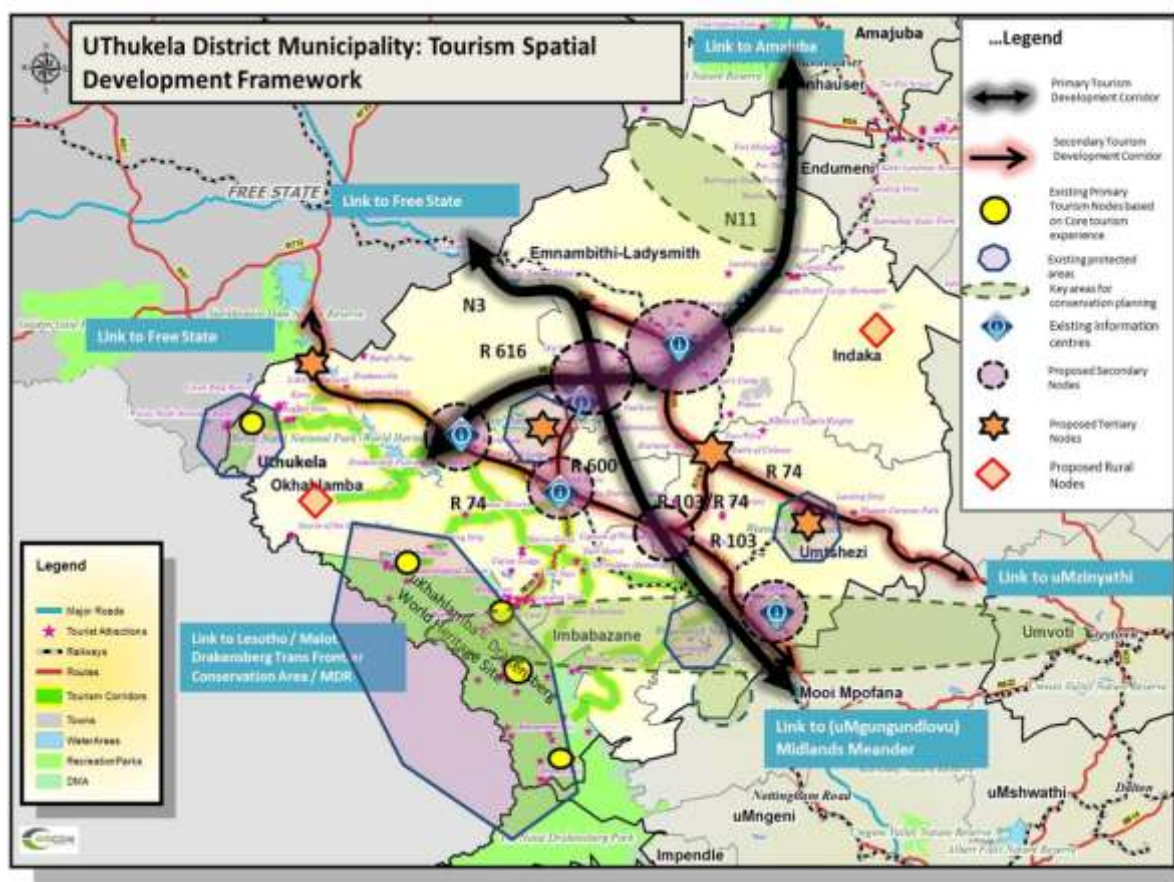
Route development can 'offer a promising potential vehicle for local economic development in many small towns and rural areas of South Africa. The clustering of activities and attractions through the development of tourism routes potentially can stimulate cooperation and partnerships as well as catalysing entrepreneurial

opportunities⁵². Taking this into account route development is a key tool for marketing and local economic development as well as for coordination of tourist activity.

This project entails partnering and engaging in constant communication with N3 Gateway and Open Africa, Maloti-Drakensberg Route, Drakensberg Experience and other interested and affected parties. All existing routes need to be identified and amalgamated into the district route. The district needs to become a member of the N3 gateway as this is essential for marketing and diversifying the marketing exposure of uThukela District. Projects such as the Maloti Drakensberg Route, Drakensberg experience etc. need to be synergised with the district route plan. It is important to note that the proposed route must integrate with surrounding and adjacent routes and must not be in conflict with any other route and route plan. This project is to be ideally managed by the proposed Regional Tourism Organisation (R.T.O).

The purpose of this project is therefore to pool resources together as well as all individual routes to create a diversely themed single district wide route to consist of the varied existing and potential sub routes to achieve coordination with regard to management, standards, ownership and maintenance. Below is a figure showing a proposed overall conceptual framework of the major tourism routes and nodes. This will then be marketed accordingly.

Goal: Establish a district wide route plan with themed sub routes and market as a single route with local economic benefits and map this which will ultimately be implemented by the proposed Regional Tourism Organisation.



⁵² Robertson. C. 2006. LED and Route Tourism. University of Witwatersrand

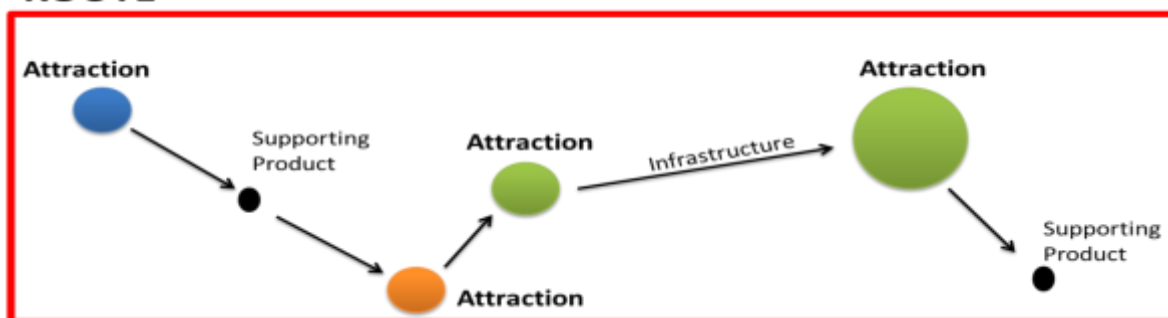
Figure 53 - Figure showing a proposed overall conceptual framework of the major tourism routes and nodes
(Source: Urban-Econ)

What is a Tourism Route?

This section provides a brief understanding of what a route is and the principles it entails to provide some direction. A route is:

- A method of linking and marketing tourism activity along a physical trail.
- It can be themed, and consist of nodes/ clusters of different- or similar types of tourism activity.
- It involves tourism activities, supporting products, infrastructure, and is typically driven by product and service owners

ROUTE



Principles of Tourism Routes

- Tourism routes are usually designed around or within close proximity of a traffic generating corridor
- A tourism route does not necessarily consist of a single or main route but could consist of the system or network of routes;
- It then follows that the system or network of sub-routes makes up the complete route
- Routes and the sub-routes are generally but not always circular in design so that the tourism does not have to return along the same route travelled in the first instance;
- Cul de sacs may exist in route planning but should then preferably not exceed 5km in length and therefore should be at least one major attraction along or at the end of the route

Examples of existing routes:

- Midlands Meander : <http://www.midlandsmeander.co.za/>: "A Good Place"
- Route 66 Zulu Heritage Route: <http://www.zululandroute66.co.za/>: "Your Gateway to the Zulu Kingdom"
- Route 62: <http://www.route62.co.za/>: "Good food, wine and people: What are you waiting for?"



8.3.2 Project Scope and Description

This project entails a Concept, Business and Implementation Plan for District Wide Route Development in UThukela DM with following considerations:

- Tourism is one of the key economic pillars of the district
- There is a need to grow and develop sustainable responsible tourism in the region that focuses on participation, job and income creation for local communities as well as acts as a mechanism for investment attraction
- Tourism routes have been developed by the District and Local Municipalities as a key Tourism Sector driver.

- It is understood that this plan must generate detailed, practical and real opportunities and strategies for tourism product support and development
- Coordinate route amalgamation to enhance and incorporate the various tourism opportunities and experiences offered throughout uThukela in relation to international linkages (MDR) and surrounding districts as well.

8.3.2.1 Objectives

- Develop the spatial concept, business and implementation plans of the proposed route
- Identify existing products and attractions along the route for inclusion in the total route that speak to the cultural, heritage and nature offerings in the area amongst others
- Identify and quantify required supporting infrastructure
- Identify and quantify new products that that should be developed
- Create a route map with GPS coordinates

Key Considerations

- Sub routes will be varied in term of tourist experience, for example, a cultural and heritage route as proposed by the strategy will encourage market segments who take an interest in culture and heritage to visit and spend time and money along the themed route for example.
- An important route that the district route would have to align to is the Maloti-Drakensberg Route and Drakensberg Experience Route
- Liaison needs to be made with Open Africa and N3 Gateway as these bodies deal explicitly with tourism routes
- A name, brand and image needs to be given to the route aligned to district, provincial and national branding
- A linkage with Midlands Meander, Maloti-Drakensberg Route and Drakensberg Experience needs to be fostered
- Potential routes identify through the uThukela strategy need to be incorporated and further investigated and amalgamated into the district route
- It is envisaged that any future routes that are formed, confine to the branding, image etc. of the proposed district route and are amalgamated into the district wide route
- The route should have a dedicated website as well linked to the proposed website
- The route plan and potential projects need to be reviewed every year
- Rural tourism needs to be investigated through route planning
- A steering committee needs to be formed to manage the district route and deliberate on key catalytic actions to take place. This steering committee can be a function of the proposed Regional Tourism Organisation.

8.3.3 Activities to be undertaken

The activities to be undertaken by the DM are as follows:

1. Formulate TOR and appoint service provider, and elect project steering committee for the envisaged route plan
2. Package funding sources
3. Implement and manage the project from initiation to completion
 - a. Key deliverables/activities for the successful completion of the project include:
 - Situational Analysis/Review Of Tourism Status Quo
 - Route Survey And Clustering to develop Existing/Current Market Profile
 - Identify existing products and attractions along the route for inclusion in the route that speak to the cultural and natural environmental offerings in the area
 - Identify and quantify required supporting infrastructure along the identified and potential routes including the scale and scope of supporting infrastructure needed for both product owners and tourists
 - Identify and quantify new products that that should be developed along the route.
 - Environmental Resources Audit of the Route Area

- Cultural Audit of the Route Area
- Universal Accessibility Audit of the route and therefore sub routes
- Provide a detailed situational analysis of the tourism industry within the District that considers the planning initiatives both locally and at a provincial and national level.
- Initial consultation with product owners, perceived beneficiaries and community members along the route.
- Identifying new business opportunities to expand the current offering along the route
- Initial market research of the Route, culminating in a SWOT and Gap Analysis
- Develop the route and spatial concept of the proposed route
- Identify suitable management and operational structures to support the route's development
- Review the financial considerations of the Route development.
- Develop a marketing plan for the identified route that aligns to nation and provincial imperatives and district image and branding
- Route Map with GPS coordinates
- Develop a business plan and implementation plan that supports the Route's development.

4. Monitor and evaluate the project outcomes according to KPIs indicated below.

8.3.4 Envisaged Outcomes and Key Performance Indicators

- Consultation plan formulated and key stakeholders identified
- Tourism Status Quo Document
- Survey of tourists into the Route, identify market demand trends
- Demand database
- Product Supply Database
- Spatial Concept
- Survey Findings
- Route Concept: Environmental, Infrastructure and Social Development Testing
- Marketing Guide
- Feasibility and Business Plan Report
- 5 New route projects identified
- All routes identified and amalgamated with detailed existing and potential attractions along each route as well as all routes themed accordingly
- All routes mapped with GPS coordinates
- Route Plan formulated and implemented
- Institutional structure in place and route participants identified
- By monthly meeting held with all affiliated stakeholders after plan is completed

8.3.5 Envisaged SMME development and Transformation potential

Routes allow for integration of tourism products and stakeholders. The route management organisation needs to take an unambiguous pro-poor stance. 'A tourism route is a destination-level partnership that brings people from all levels of the community together in promoting tourism to their area' (Open Africa, 2009b in McLaren, 2011). This quote indicates the potential for route tourism to be inclusive of disadvantaged communities.

8.3.6 Cash Flow and Timeframe

The proposed project is envisaged to continue for duration of four months within 2012/2013 or 2013/2014 financial years. The total estimated cost for the formulation of the route plan is R 275 300. This cost excludes the probable budgets that may arise to fund projects emanating from the plan.

Linkage to other projects	This project is linked to projects 1.2.7, 1.2.3, 1.2.4, 1.2.5, 1.2.10, 1.2.12, 2.2.2, 2.1.6, 2.2.7, 2.1.13, 2.2.15, 2.2.24				
Implementing Agent/s	uThukela DM proposed RTO, LMs, CTOs, LTFs, TKZN, SAT				
Potential Funding Sources	COGTA, DEDT, DAC, sponsorships from businesses, RTO, IDC, TIKZN				
Cash Flow	Total Cost	Month 1	Month 2	Month 3	Month 4
Total	R 350 000	R 35 000	R 105 000	R 140 000	R 70 000

8.3.7 Conclusion

In conclusion, the proposed project is the establishment of a district wide route feasibility study and business plan which amalgamates all sub routes within uThukela DM and is marketed accordingly as a single route which opens up economic opportunities for communities. This plan will be handed It is envisaged that through the district wide route development plan, visitor numbers are to be increased through offering the visitor a holistic and varied tourism experience that uThukela DM is characterised by which includes, cultural, heritage, nature based tourism including adventure tourism and avi-tourism as well as potential community and rural based tourism etc. The length of stay of visitors needs to be increased by offering more opportunities and activities within the district which will be addressed through the amalgamation of routes and theming of sub routes will open up more entrepreneurial and commercial opportunities within the tourism space for communities to participate in and benefit from.

The proposed project will result in a route plan which provides guidance and direction to route planning in uThukela DM to be handed over to the proposed Regional Tourism Organisation to manage and implement.

8.4 Project 2.3.4 Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /centre

8.4.1 Project Background and Purpose

This project entails the development of a themed district tourism information centre which includes a district craft centre coupled with commercial space for crafters and related trade and exhibition space for performers. Currently central attractions of district tourism impact are limited and tourism development is uneven, and marketing and exposure uncoordinated. UThukela famously known for the Battlefields and World Heritage site attractions retains an established tourism visitor base. Tourism in uThukela is set to boom more intrinsically with developments to tourism such as Maloti Drakensberg Route, potential projects by EKZNW and other planned Local Municipality projects. With this in mind uThukela needs to be equipped with adequate tourism infrastructure, i.e. accessible, tourism support facilities and attractions.

This project is in response to the need for a central district information node and tourism hub as a major attraction and 'one stop shop' for tourists which provides immense opportunities for SMMEs through support centres and a platform for emerging SMMEs to operate in partner with DAC through the development of a

craft and entertainment centre. This will be the focal point of tourism information, tours and retail. This development is envisaged to operate like the Thokozisa information node which is seen to be a successful private sector driven development. The proposed tourism information hub must not undermine the existing Central Drakensberg Information Centre (Thokozisa information node); it must compliment this successful initiative. The proposed project will aid with the promotion of the district.

Existing information centres are not inclusive of all areas offering tourism attractions, and public owned facilities are in poor condition and are not easily accessible. Existing publically owned information centres are also not fully equipped with the necessary ICT infrastructure to keep abreast with the changing technological environment that tourists are familiar with. The central Drakensberg Information centre which is a privately owned initiative is currently a well-run and successful example of an information centre in uThukela DM. There is need for a focal point for tourism information dissemination for the entire district, with the existing sub information offices. There is limited coordination with regard to tourism information centres, and existing centres receive little exposure, therefore a tourist may not know where to go if not directed from places outside the local municipality. Not all local municipalities have information centres, hence by having a central district centre it will aid with exposing all local municipalities and their respective attractions, and aid visitors in getting to these areas. This will enhance exposure to rural tourism initiatives and tourism products. The National Rural Tourism Strategy 2011 identifies information and marketing as a key strategic aim for rural tourism. This project aligns to the National Rural Tourism Strategy as it aims to market rural tourism and expose under marketed rural areas. There is poor distribution and information dissemination processes. Individual LMs are active in creating a platform for information dissemination and events to commemorate and inspire tourism. The district wide centre will provide support to make such initiatives district wide to reach all in the district for purposes of thorough geographical spread.

Currently there is immense potential for crafters and performers in all local municipalities (including Indaka) and the Department of Arts and Culture has identified this potential and has a programme to aid arts and craft related initiatives by creating a platform for people to access opportunities through exhibition etc. A data base of 52 craft cooperatives has been sourced and there are more which have not been captured. Therefore arts and craft market in uThukela has great potential to be fostered and promoted.

The purpose of a visitor information centre is to equip visitors with relevant information about tourism products and services within a destination or region. According to the National Treasury Budget Estimates for 2012 (available on <http://www.treasury.gov.za/documents/national%20budget/2012/enebooklets/Vote%2035%20Tourism.pdf>), R8.6 million between 2012/13 and 2014/15 is allocated for spending on consultants to support the development of the visitor information centre brand and national tourism information gateway space planning. The VIC (Visitor Information Centre) Framework by NDT, makes reference to the concept of information gateways, these information gateways are envisaged to be strategic locations positioned with the purpose of providing relevant and timeous information and are also seen as points of entry. Points of entry definition can be accessed through the VIC Framework for further information. This needs to be taken into consideration for funding as the proposed project acts as a Gateway to the district and Province as it is envisaged to be located along the N3 (with exact location to be determined).

The purpose of this project taking the above discussed background into consideration is to establish a district wide Tourism Information Hub which includes a district craft centre coupled with commercial space for crafters and related trade and exhibition space for performers to achieve the objectives listed below.

- Provide accurate information on the tourism product offerings that could be consumed by visitors in uThukela and surrounding areas,
- Support tourism growth by influencing visitor flow throughout the district, province and country;
- Provide generic tourism material, a user-friendly e-business platform that provides the necessary tools for information and reservation management and professional tourism services to visitors;
- Assist SMME development by facilitating the sale of their goods and services;
- Assist in promoting the products of SMMEs to the world market; and

- Contribute to the local economic development of the region through the facilitation of higher spend by visitors to the area⁵³.

The detailed elements envisaged for the centre are discussed in the sections to follow.

8.4.1.1 Legal Environment

The following legislation needs to be complied with:

- Visitor Information Centre Framework, Department of Tourism
- KwaZulu-Natal Planning and **Development Act**, 1998 (Act No.5 of 1998)
- **National Environmental Management Act** No 62 of 2008
- This hub should comply with the objectives and goals of the related responsible departments, such as KZN Department of Arts and Culture.

8.4.2 Project Scope/description

The project is envisaged to entail:

- A **themed** and **inspired** tourism information office (please note that this project is envisaged to be an imaginative, unique and exciting experience to retain and attract visitors hence all attempts need to be made to make this a lasting experience with utmost impact)
- An arts and craft centre and curio/gift shops. The district craft centre which will allow for a platform for arts and craft development and enterprise. This centre can serve as a common area for craft exhibitions and training etc.
- An entertainment area with Zulu themed attractions such as Zulu Dancers and games and interactive sessions with the Zulu culture
- Tourism support and development kiosk
- Exhibition space with a multimedia centre
- Local cuisine and food outlets
- A cultural and heritage interpretation centre can also be incorporated
- Tour guides and operators
- Possible spa treatment area.
- Possible consideration also needs to be given to developing a petrol station.



Figure 54 - International Example of a visitor Information Centre (Source: VIC Framework)

Key considerations:

⁵³ As aligned to the VIC Framework

- Other possible projects to be packaged in relation are accommodation facilities, and additional tourist attractions as well as the office for the proposed R.T.O.
- The development needs to be appealing to its audience through adequate themed creative and unique designs which promote the varied tourist experience. The information centre needs to be fully equipped with ICT infrastructure. The hub is to be managed by the private sector with vested interest.
- **Location:** currently there are two possible locations for this district information and craft Centre which need to be further investigated. The first is the already proposed Bridge to Nowhere location, and the other has to be established on major transport routes (N3, N11, R 74 junctions). The location **alternate** to the Bridge to Nowhere proposed location will depend on land legal issues, environmental issues, proximity to petrol stations, demand and traffic volumes. The exact identification of land should ideally come through the feasibility study or the business plan stages of the planning component of this proposed project.
- The most prominent location for the district wide information hub would be along the N3 and visible to passers-by. UThukela is strategically positioned with the N3, N11, R103 and R 74 running through the District municipality. The N3 is a major carrier of passengers to and from Durban, Gauteng, the Free State etc. and is an important movement route for the flow of tourists. Therefore it is ideal to have a hub that captures visitors from along this route. Exact locations will need to be determined through a pre-planning or feasibility study.
- Possible information kiosks can be erected in future especially in rural and outlying areas.
- As this project relate to tourism information dissemination and opportunities for SMMEs, a key consideration should be to upgrade existing information centres in Bergville, Winterton, etc. to compliment this district wide tourist attraction. Current upgrades include the tourism information Centre at Colenso, and Ladysmith which will have a significant impact on tourism.
- The Centre should make provision for a monitoring and evaluation system to track progress, demand etc.
- The Centre needs to be inclusive of all local municipalities and therefore needs coordination from all LMs to function. All LMs need to provide the district information hub with relevant information and guides to tourism development, attractions, and products within the respective local municipality.
- The main function for the district wide initiative is to expose the entire district in respect to its tourism content.
- The information Centre will have a system to deal with enquiries
- Tourism officers responsible for disseminating information and guiding visitors to the district must be constantly work shopped and obtain continuous professional development to ensure the utmost professional and up-to-date service to tourists.
- Tourism offices need to be fully equipped with trained staff, reliable ICT and other facilities to aid a tourist. Navigation should be provided by means other than a map on a brochure, tourist information centres should also cater for local economic development through promoting local skills.
- Tourism officers need to be well aware of the tourism related activities in and around the areas.
- Key gateway points to surrounding countries, in this Lesotho need to be developed as complimentary to the district information hub.
- If the Ladysmith airstrip is developed to accommodate frequent usage, it could act as a gateway to uThukela DM. In this case due consideration should be given to create an information kiosk at the Airport to serve as a key point of information dissemination.

8.4.3 Competitive/Comparative Advantage

This initiative provides for a district wide tourism hub which does not only affect uThukela DM but surrounding districts and regions as well. Due to its central envisaged location the tourism node will be strategically positioned in relation to existing petrol stations etc. almost equidistant from Gauteng and Durban which are the sender and attractor economic hubs which are highly influential on the flow of tourists along the N3 and N11. By having a district wide information centre it will expose all local municipalities and surrounding tourism products and attractions by being all inclusive. If the district tourism information hub and craft centre is not built, this means that tourists only option is to use the information centres available deep within the small towns of, Escourt, Bergville, Winterton and service centres such as Ladysmith which are not as visible due to location. As seen through the interview process of through the formulation of the tourism strategy, tourists

and visitors tend to 'discover' the tourism products within many places in uThukela by 'stumbling' upon them as a by-pass to reaching other areas. If a district wide information centre was strategically positioned along a junction on the N3, this will increase visibility to draw in tourists to explore and will in turn expose the district and all it has to offer with regard to tourism. Also if bookings etc. can be made at the district information offices, it would increase the functionality of the proposed district information centre and open up opportunities for businesses in uThukela DM.

8.4.4 Location

With regard to location which is a defining factor, there are currently two options, however, these will need to be further investigated and other possible locations may emanate from the feasibility study which complement existing well-functioning information offices.

Currently there are two possible locations for the proposed District Information Hub and Craft Centre which need to be further investigated. The first is the already proposed Bridge to Nowhere location, and the other has to be established on major transport routes (N3, N11, R 74 junctions). The location **alternate** to the Bridge to Nowhere proposed location will depend on land legal issues, environmental issues, proximity to petrol stations, demand and traffic volumes. The exact identification of land should ideally come through the feasibility study or the business plan stages of the planning component of this proposed project.

The most prominent location for the district wide information hub would be along the N3 and visible to passers-by. UThukela is strategically positioned with the N3, N11, R103 and R 74 running through the District municipality. The N3 is a major carrier of passengers to and from Durban, Gauteng, the Free State etc. and is an important movement route for the flow of tourists. Therefore it is ideal to have a hub that captures visitors from along this route. Exact locations will need to be determined through a pre-planning or feasibility study and option other than the two possible locations identified here will be investigated through the feasibility study.

8.4.4.1 Proposed 'Bridge to Nowhere' Project

A possible link to the proposed 'Bridge to Nowhere' project is an option for this development and could be seen in relation to it. Documentation is available on the 'Bridge to Nowhere' project which includes a feasibility study. The 'Bridge to Nowhere' project is already supported by Zimele Investment Enterprise Company and surrounding land owners, however is still undergoing feasibilities. The Bridge to Nowhere project is similar to the proposed project however; it entails much more detail with regard to a Big Five Game Reserve and accommodation components. The Bridge to Nowhere project has a provincial and national significance as well. It is recommended that the district contact Okhahlamba Development Agency in this regard to decipher a way forward for the 'Bridge to Nowhere' project in relation to the current proposed project as there must not be any duplication



Figure 55 - Envisaged Bridge to Nowhere Tourism Node conceptual diagramme (Source: Okhahlamba Development Agency)

8.4.5 Activities to be undertaken

- a) **Identify location:** As a preliminary planning exercise, a desirable location needs to be identified and investigated through the feasibility study.

- b) **Resolve land legal issues with regard to location:** especially if the development is to be located along the N3, R 74 or N11.
- c) **Solicit funding for and commission a feasibility study, and business plan to be undertaken for the establishment of the proposed district information hub.**

This step involves creating a foundation for the proposed project. Firstly it is mandated that a feasibility and business plan be completed prior to implementation and application to establish a tourism information centre and district craft centre and secondly it is imperative to commission these plans as they will direct the project in detail. The main purpose of this planning stage is to determine whether or not the project is viable enough to carry through to future stages. The feasibility study and business plan will aid in determining interested role players to the project which is imperative to lobby for funding and will enhance the feasibility of the project. These steps will involve identification of potential sites for the development as well as potential funders and other detailed specifications.

Step	Task	Key Performance indicators	Implementing Agent
1	Identify key role players to partner with and involve in the process	Role Players Identified	uThukela DM
2	Source funding	Funding secured	
3	Write Terms of Reference and conduct a tender process	TOR formulated	
4	Appoint a service provider	Service provider appointed	
5	Implement and manage the formulation of a feasibility study and business plan from initiation to completion through monitoring and evaluation tools such as PSC meeting	<ul style="list-style-type: none">Number of PSC meetings heldFeasibility study and business plan complete	

- d) **Secure funding for the establishment of the proposed district tourism information hub and craft centre.** This step is important when undertaking the next activity as it has to be proved that funding is available to sustain the construction and operation of the proposed project. The business plan will aid with this. The possible sources of funding include, IDC, TIKZN, National Treasury, DEDT, DAC, uThukela DM, National Department of Tourism.
- e) **Construction of the information hub and craft centre**
This activity involves soliciting funding for the establishment of the physical centre and overseeing the construction process. This activity will follow the construction project life cycle.
- f) **Operationalize the information hub and craft centre**
This activity deals with the actual operation and management of the centre which includes staffing requirements and implementation of the relevant programmes and tourism SMME support rendered. An operational plan should be drawn up at this stage to foresee management issues. Trained staff should be allocated to carry through necessary tasks.

8.4.6 Key Performance Indicators/ Anticipated Outcomes

- Feasibility study/Business plan undertaken and exact location determined
- Information centre constructed in accordance with Visitor Information Centre strategy and Craft centre constructed
- Management and operational plan in place
- M&E system in place
- Identify satellite tourism information centres in Indaka and Imbabazane
- Procure passionate and qualified staff and procure SMMEs to conduct business within the vicinity in accordance with Procurement strategy and Craft and Visual exhibition in conjunction with DAC
- Number of exhibitions and events held by DAC (Support provided to Craft and Visual exhibition in conjunction with DAC by holding exhibitions and events)
- Number and types of marketing material used to promote information hub (Promoted and exposed district craft and tourism hub through adequate marketing).

8.4.7 Indicative Budget/ Cash Flow and Time Frame

The total budget envisaged for this project is ± R 5.5 million. This is a capital project and will include costs for the following activities:

Project Phases	Indicative Budgets
Phase 1: Planning	
• Feasibility studies and business plan,	• R 600 000
Phase 2: Execution	
• Detailed designs,	• R 3 500 000
• Construction of the facility(including contingencies, professional fees and other costs),	
Phase 3: Operationalization and Monitoring and Evaluation	
• Implement operational plan and staff costs (including maintenance, stationary, ICT, printers and other office equipment etc.),	• R 1 400 000
• Maintenance / Monitoring and evaluation.	

Please note that this budget will vary according to design specifications and requirements for the functioning of the facility (size of facility and décor, types of material being used etc.). The actual size of facility will be determined through the feasibility and business plan. The table below shows an indicative yearly cost estimate breakdown for a five year period.

Yearly Budget Breakdown (DM Responsibility)						Yearly Budget Breakdown (Outsourced Funding)						Total 5 year Budget (DM + Other)
2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (DM)	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (Other)	
R 500 000	R 900 000	0	R 0	R 0	R 1 400 000	R 0.00	R 0.00	R 2 400 000.00	R 850 000.00	R 850 000.00	R 4 100 000.00	R 5.5.mil

8.4.8 Envisaged SMME and Transformation Potential

SMME support and inclusion of previously disadvantaged persons are fully supported through this initiative as it provides a platform for support and exposure with the buy in from DAC.

Approximate employment figures which will be created through the construction process (duration of the construction phase) as well as the operational process (that is the output per year after construction and operationalization) of the facility as indicated by an Input-Output Multiplier Model used, are indicated in the tables below based on a capital injection of R 5.5 million. The indicators include new business sales, Gross Value Added, Income Multipliers, and employment multipliers. For the capital and operating multipliers, the new business sales turnover is almost triple the amount injected into the establishment of the facility and employment indicators show a large number of opportunities opening up for job creation through this initiative.

Capital Multiplier Outputs	Total	Direct	Indirect
New Business Sales	R 15 334 984	R 6 803 811	R 8 531 173
Gross Value Added	R 5 448 322	R 2 251 506	R 3 196 817
Income Multipliers	R 2 689 450	R 1 192 520	R 1 496 930
Employment Multipliers	150	80	70

Table 17 – Multipliers for the construction process derived for the capital input of R 5.5 million (Source: Urban – Econ Input - Output Model 2010)

Operating Multiplier Outputs	Total	Direct	Indirect
New Business Sales	16 673 312	6 064 696	10 608 615
Gross Value Added	6 034 304	1 538 276	4 496 027
Income Multipliers	3 156 431	1 324 855	1 831 576
Employment Multipliers	500	150	350

Table 18 - Multipliers for the operating process derived for the capital input of R 5.5 million (Source: Urban – Econ Input - Output Model 2010)

8.4.9 Role Players/Implementing Agents and Potential Funding Sources

- National Department of Tourism (VIC funding from National Treasury)
- DEDT, DAC, sponsorships from businesses, IDC, TIKZN, surrounding district municipalities, Provinces;
- uThukela DM;
- Local municipalities;
- Tourism agencies and associations; and
- Private sector.

8.4.9.1 Roles and Responsibilities

According to the VIC Framework, the respective roles and responsibilities of stakeholders are as follows:

a) Role of the National Department of Tourism

- Implementing the 'I-sign' for Tourism. The regulation of the use of the 'I-sign'⁵⁴ needs urgent attention and should only be allowed to be used by accredited information facilities with qualified personnel.
- Provision of a national database with tourism products and services to all VICs;

b) Role of Provinces

- Develop provincial guidelines that is in line with the national guidelines;
- Identify correct locations of the VICs in partnership with Municipalities and other relevant stakeholders;
- Ensure that the development of VICs prescribes to the principles of job creation at local level;
- Ensure that financial support concerning the establishment and maintenance of VIC is provided; and
- Responsible for broader operational oversight.

c) Role of Provincial Tourism Authorities

The provincial tourism authority as the marketing arm of the tourism portfolio for the province is an important stakeholder. The tourism authority:

- must ensure that a database of provincial attractions are available;
- provide the VIC with relevant marketing inputs;
- keep the VICs management informed of upcoming events and new initiatives in the province; and
- assist the VIC in its role to advance local tourism products, especially those from disadvantaged communities.

d) Roles of Municipalities

- Municipalities, Regional Tourism Organisations and Local Tourism Organisations will collaborate to identify suitable sites for VICs;
- Municipalities to provide necessary financial support for the maintenance of the VICs;
- Provide assistance in the development phase of the project;
- Maintain the ICT system;
- Provide updated membership listings;

⁵⁴ This includes the 'I-sign' as well as the 'direction I-sign'

- Provide personnel to man the centre; and
- Apply for all necessary communication requirements.

e) Role of Community Tourism Organisations (CTO)

A CTO serves as a co-operative representing all components of a destination's tourism industry - hotels, bed-and-breakfast venues, self-catering establishments, restaurants, tour operators, tourist attractions, transport carriers, local authorities, and the retail and commercial resources that are important to tourists.

Each component of the destination's tourism industry is very competitive, yet they all share that competitive spirit with the CTO to ensure that it becomes an effective organization able to carry out a comprehensive, unified marketing campaign for the community. The CTO is therefore the destination's single most important marketing organization which must project the destination's image into the various markets.

8.4.9.2 Ownership

Ownership of the VIC is a complex issue due to the fact that the situation in each of the areas is different. It is therefore not possible to utilize a single model of ownership. A non-negotiable however, is that when the funding source is an infrastructural grant, ownership cannot be vested in a private enterprise. As a result it was therefore necessary to develop criteria for ownership and to rank these in order to facilitate objective decision making. Crucial elements include the sustainability of VIC as well as the need to ensure that the centre benefits tourism development for the broader community. Criteria therefore had to take these elements into account. Given this, the diagram below represents the decision making process⁵⁵.

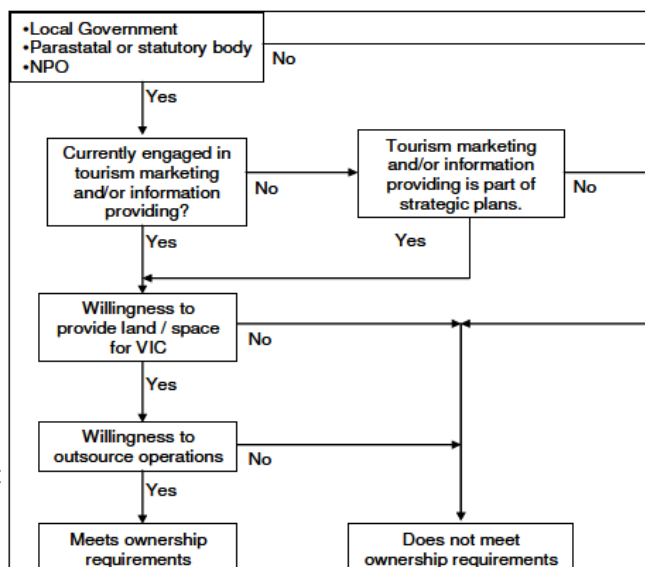


Figure 56 – Ownership decision making (Source: VIC Framework)

8.4.10 Physical and resource requirements

In alignment with the Department of Tourism Visitor information Framework for South Africa, the requirements of the proposed information hub are listed in this section. Please note that the below information is extracted directly from the above mentioned framework, this extract is what is proposed for VICs-Visitor Information Centres in South Africa and specifications can deviate, therefore it is a general guideline for the development of a VIC in uThukela DM. The feasibility study and business plan should ideally identify the key specifications.

⁵⁵ Visitor Information Centre Framework

8.4.10.1 Key aspects for a VIC:

- A facility to make bookings;
- Information on the availability of accommodation;
- Integrated services and a call centre;
- A Database that is maintained; and
- Internet facilities that is available to the public.

The following key functionalities have been identified through this framework in Visitor Information Software Systems,

- An electronic membership database for all tourism products;
- Customer relationship management capabilities;
- Media management facility including advertising services; and
- International accessibility that can accommodate advertising.

8.4.10.2 A Visitors Information Centre model for uThukela DM

This section provides a model identified for VICs in South Africa through the National VIC framework by the Department of Tourism.

8.4.10.2.1 Location

The location of a VIC influences the functionality of the information centre. VICs are therefore categorized according to the function they perform relative to the geographical area that it is intended to serve.

- it is of critical importance that VICs be located in areas that have the greatest potential for positive impact on delivering a service to visitors and the tourism industry; and
- the location be influenced by the availability and suitability of land for the specific type and size of VIC needed.

In the case for uThukela a location along the N3 is recommended, preferably on the junction of the N3, R616 and N11, however this will need to be investigated. An area that is visible from the N3 is the most prominent location due to the large flow of people commuting along the N3 on a daily basis. By locating the VIC along the N3 this offers great potential for delivering a service to visitors in a wider sphere.

8.4.10.2.2 Key elements of a VIC

The main elements of a VIC, assuming in this case that a full scale information centre is to be built, are:

- Information/help desk;
- Display area;
- Internet stations;
- Coffee Shop;
- Visitor Lounge;
- Booking area;
- Trading area (arts and craft centre);
- Interpretive space;
- Office space;
- Interactive displays; and
- Call Centre.

It can be recommended that the 'Add-on' facilities should be available in a certain radius from the VIC if it is not located within the VIC. An example of the general layout of a VIC is provided below. Detailed design requirements can be obtained from the VIC Framework, National Department of Tourism.

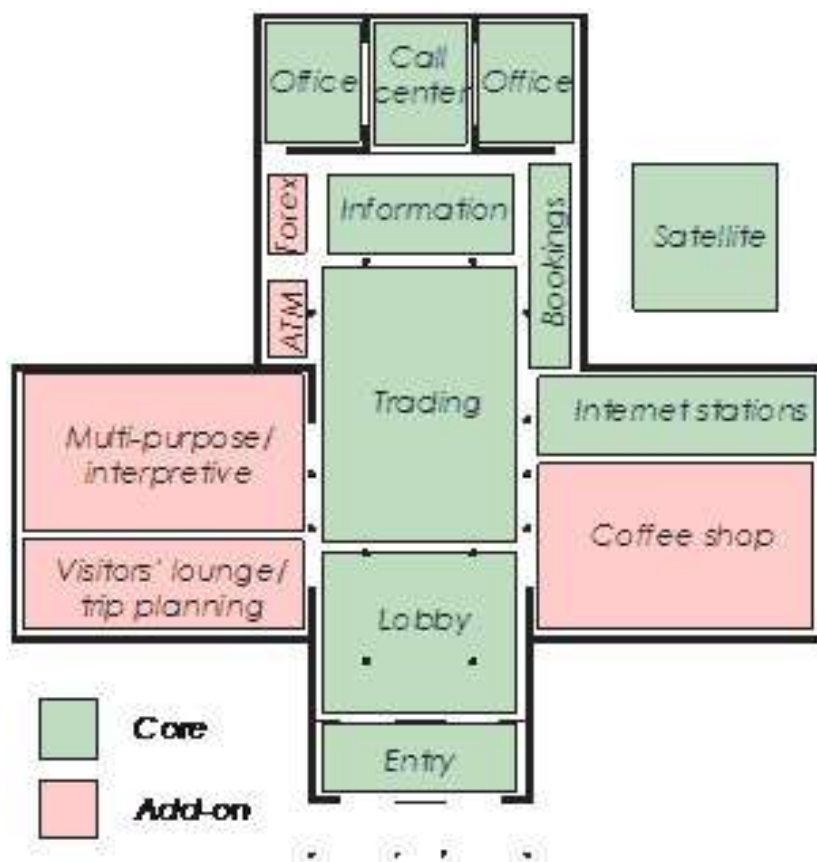


Figure 57 – Example of the General layout of an information centre (Source: VIC Framework)

It must be noted that there are three types of VICs that can be implemented, these are, Visitor Information Centres; Satellite Information Centres; and Information Kiosks. For each of these models there are different key requirements for the functionality as shown in the table below.

	Model 1: Visitor Information Centre	Model 2: Satellite Information Centre	Model 3: Information Kiosk
Information desk	X	X	X
Interpretative area	X		
Internet services	X	X	
Booking services	X	X	
Trading area	X	X	X
Administrative offices	X		
Coffee shop	X		
Plasma display	X	X	
Interactive (touch) screen			X

Table 19 – Proposed Functional Areas for the different models (VIC framework, National Department of Tourism)

8.4.10.2.3 Information, Communication and Technology (ICT) System

This is based upon the fully fletched VIC model. It is recommended that the ICT functionality for a VIC include:

- Existing Travel Information Content e.g. explore, travel, eat, accommodation, news, weather etc) ;
- Development of a map of the surrounding environment;
- The necessary licensing;
- Installation of hardware into the information kiosk housings;

- Installation and development of software;
- The requirement management, operation and availability of the system;
- The required maintenance and technical support;
- For capturing, management & updating of all information displayed on the screens;
- Sales of advertising space, operations and management of the information engine;

8.4.10.2.4 Visitor Information Management System

The system should be developed in a way that it will enhance the tourism environment within uThukela and surrounds. Some key issues that such a system should address are:

- Encourages feet through doors and directs traffic to destinations;
- Ensure that visitors are better informed of products and places available;
- Ensure visitors can help themselves to information without waiting for assistance;
- Ensure that information is always available, relevant and up-to-date;
- Ensure that all associated 'members' will receive listing on all systems countrywide;

It is therefore critical that such as system included in its design a standard Web design for all owning agencies, standard main categories thus ensuring visitors have the same touch and feel wherever they are. On the back-end the system has a content and media management with and inventory database.

8.4.10.2.5 Recommended standards

In order for the proposed Information Centre to be recognised nationally, obtain registration as a tourism establishment and receive support as well as use the proposed 'I-sign', the following standards need to be adhered to. Also, standards are needed to fulfil VICs objectives. These standards, according to the VIC Framework should include:

a) 'Operating hours

- Operating hours should be displayed, including the after-hours telephone numbers and the website address;
- Uniform operating hours for example 08h30 to 17h00 should be considered for all VICs with the exception of national gateways where the times will be more flexible;
- Where possible provision should be made for self-help kiosks where visitors may use electronic interface to obtain information on a 24 hour basis;

b) Provision of Information

- Visitor information centres should provide comprehensive information about the destination, accommodation, attractions, cultural activities etc. within the locality;
- A booking facility which is web based should be available and staff within the centre should be able to assist visitors by processing their enquiries;
- There should be a notice board for current and upcoming events;
- It should display a map of the given locality or area; and
- Important information related to emergency numbers for police, ambulance, nearest health centre should be clearly displayed,

c) Human Capital

- Depending on the salary structure of a given municipality, the centre can be manned by two or three fulltime personnel;
- One of the employees should have experience as a tourism officer or alternatively have management experience;
- The universal sign for the tourism information centre and the 'Welcome Man' must be displayed on name badges of staff members;
- Staff members should be trained on a continual basis on service excellence and customer care; and

- Schedule for training programmes for staff should be developed and a standard approach to capacity building of staff should be adhered to.

d) Branding

- The structure and design of different visitor information centres must comply to international best practices;
- The mission statements and principles of the centres should be displayed clearly;
- Uniform branding of collateral material such as brochures, letter heads etc.;
- A visible sign reflecting tourism information centres to be displayed;
- Adequate road signage should direct visitors to the centre;
- Clear internal signage should be visible throughout the centre;
- The National Department of Tourism's website as well as key national contact details, e.g. for the Tourism Protector, should be clearly visible; and
- All tourists marketing material should include a map indicating direction to the centre.

e) Business and Management

- Business plans for the VIC should remain current;
- Operating manuals should be updated regularly;
- Database which would contain visitor profile and their country of origin must be kept updated;
- Centre management must ensure that visitors satisfaction surveys are conducted regularly;
- The centre will be operated by either the municipality, province or agency with the relevant experience and capacity;
- Certain functional elements of the centre may be outsourced to independent operators;
- The owning agency will ensure that the database of all members be updated regularly and the website is continually kept up to date; and
- The owning agency will also be responsible for the updating and maintenance of the ICT system.

8.4.11 Conclusion

The proposed project is envisaged to create employment and support to SMMEs and provide a source of reliable and up-to-date information to tourists and at the same time create a favourable and welcoming environment for tourists. The information centre is also linked to other project coming out of the uThukela District Tourism Strategy 2012 such as creating a website and database through marketing initiatives and knowledge management systems, therefore due consideration needs to be given to the related projects as well so that all activities can be coordinated and work together to provide a holistic and functional result. The steps for the DM that need immediate attention are as follows:

- Identify relevant stakeholders through a structured (PSC) discussion on the project and possible incorporation of the proposed 'Bridge to Nowhere' project to avoid duplication of efforts.
- Amend and investigate possible locations with careful consideration for land ownership etc. and discuss through a PSC of interested and affected parties,
- Lobby for funding for a feasibility study and business plan (this will only be necessary if the district has not been allocated a budget large enough to accommodate for the feasibility and business plan),
- Once funding is made available, commission the study in a timeframe of 4 months on average,
- Thereafter, secure funding for the construction,
- Once the facility is constructed, ownership needs to be dealt with accordingly and handed over to responsible party,
- Once the owner has taken possession the facility would need to be operational as soon as possible.

All attempts by the DM need to be made to proactively lobby for funding, if funding is not available and would need a strong and inspired leader to carry through the facilitation of the project.

8.5 Project 3.2.4 Facilitate the establishment of a hospitality and tourism training and development centre in the district in partner with recognised tourism training centres with satellite offices

8.5.1 Project Background and Purpose

This project entails the establishment of a hospitality and educational centre within uThukela DM with the intention to enhance the human capital of the tourism industry in uThukela. The current challenge is that there is limited research and human capital in the tourism industry for uThukela, as well as limited awareness and career perceptions of tourism. UThukela is fortunately positioned to be seen as a prominent tourist destination with a variety of existing tourism activity and major attractions such as the uKhahlamba Drakensberg World Heritage Site and the Battlefields cultural heritage and therefore has an existing tourism visitor base. However there are limited opportunities being created and as mentioned a skills shortage.

According to the National Tourism Human Resources Development Strategy, 'Human capital in tourism refers to the stock and flow of skills that are available to employers in the sector'. At the moment as stated in the National Tourism Human Resource Development Strategy, there is a general sense that 'in spite of the rich potential for tourism growth and development, South Africa does not have the level and quality of human capital to become truly competitive internationally'. The same is true for uThukela DM as seen through the weak institutional and operating structures. UThukela DM is made up of a largely underprivileged population with low skills levels to be able to absorb tourism opportunities and actively contribute to tourism and the local economies. Tourism development is unequal and needs to reach communities through skills enhancement and awareness.

By encouraging additional sector specific education centres, such as a tourism FET centres in this regard, it will significantly contribute to developing tourism in the country if adequate resources are pooled together. It is a resolution by the President of South Africa for funding (R 2.5 billion) of new FET colleges focusing on sector training to be mainstreamed within the next three years which will come from the Sector Education Training Authorities as stated in the address by the President of South Africa, at the President skills development summit, Pretoria. According to 'Times live' (available on <http://www.timeslive.co.za/opinion/editorials/2012/04/10/investment-in-fet-gives-dropouts-a-shot-at-finding-jobs> and <http://www.ewn.co.za/Story.aspx?Id=85901>). uThukela DM should take cognisance of this opportunity given the fact that education and the need for a specific tourism sector FET is needed in the district was identified through the strategy formulation of the uThukela District Tourism Strategy 2012.

The importance of knowledge and education cannot be stressed enough. It empowers individuals, industries and communities to make informed and responsible decisions and is the key to a successful tourism industry. The NTSS aims through the vision and mission to position South Africa as a top international tourist destination also stating that the amount of foreign tourists has increased by more than 3 million in 2009 and that the African continent is the largest source of foreign tourist arrivals with a growth rate of 5.6 %. As stated in the South Africa Tourism Annual report 2010/2011, tourism in South Africa continued its upward trend with 8.1 million tourist arrivals in 2010, a 15.1% increase on 2009 (more than double the global growth of 6.7%).

These statistics indicate that the tourism industry is growing and there is an evident need to fully equip South Africans with the necessary skills, expertise and capacity to absorb an influx of tourists. The aim would in that way to provide a unique experience through service excellence and quality experiences to draw visitors into the country and to retain existing visitors. The aim would be to leave visitors with an experience that will entice them to return.

In order for this to be possible, as mentioned above, skilled human resources are essential to be able to handle and provide for the needs of tourists. Tourists are visitors to a region or country and should be treated with the utmost respect. Visitors need to know that they are coming to a place which is well equipped to handle their desires.

The tourism industry is a labour-intensive service industry, dependent for survival (and at best, competitive advantage) on the availability of good quality personnel to deliver, operate, and manage the tourist product. The interaction between the tourist and tourism industry personnel is an integral part of the total tourist experience. An area for concern in uThukela District as well as other districts and regions is the quality and availability of skilled staff, rewards and benefits, labour turnover, working hours and conditions, barriers to employment in tourism, and education⁵⁶. Many of these problems are directly linked to, and may be rectified through, education provision and, where possible, accurate careers information and guidance. Education programmes need to emerge in response to the following needs for human resource development in a challenging environment:

- 'Keeping the industry abreast with the latest technology and trends.
- The availability of qualified replacement staff at all times.
- Raising the image of careers in tourism.
- Staffing new and growing tourist industries.
- Employment regulation.
- Reduction of foreign labour.
- Responding to increasingly demanding service and communications requirements of customers'⁵⁷.

These elements are seen to be sustainable human resource development (and enhancing human capital) of the tourism industry. Tourism education is integrally linked to the wider economic, social and political environment. Education features prominently in the following key elements and considerations:

- the tourism environment;
- tourism and the labour market;
- tourism in the community;
- tourism and education; and human resource development in the tourism industry⁵⁸.

Currently there is limited tourism educational intervention, awareness and limited training. There is immense potential of existing interest and need for educational facilities to enhance and enrich tourism in uThukela. With the established tourism visitor base, and low skills levels, there is an opportunity to grow the tourism industry by providing a platform for educational excellence in tourism. This project aids in creating a positive future for tourism as a career and business opportunity for many to become involved in as well as fostering a tourism culture in communities. It will aid with career perception and increased emphasis on tourism in this tourism orientated destination.

Tourism education is advocated through the National Tourism Sector Strategy as a priority aligned to the Governments Medium Term Strategic Framework election manifesto. The NTSS therefore envisages, capacity building for tourism to be critical to improve the 'overall planning for, and management of, South Africa's tourism industry'. This project falls under the broad sector of Human resource development and capacity and skills building. Some statistics as identified through the skills audit undertaken for the National Tourism Human Resources Development Strategy are seen in the figure below which depicts the employee qualification levels

Table 11: EMPLOYEE QUALIFICATION LEVEL

EMPLOYEE QUALIFICATION LEVEL			
SUB-SECTOR	% NQF 5-8	%NQF 2-4	%< NQF 1
Hospitality	18%	28%	54%
Travel and Tourism	74%	18%	7%
Gaming and Lotteries	55%	40%	5%
Sport, Recreation & Fitness	19%	37%	44%
Conservation and Tourist Guiding	22%	50%	28%

Source: Table Reconstructed from Tourism and Sports Skills Audit Final Report 30 June 2007

⁵⁶ Amoah, A.V. and Baum, T, 1997, Tourism education: policy versus practice in International Journal of Contemporary Hospitality Management pp 5–12

⁵⁷ *abid*

⁵⁸ *abid*

per tourism sub sector. It can be derived from the figure that education levels are generally very low for tourism related activity.

The National Tourism Human Resources Development Strategy identifies the following skills gaps which should be taken into consideration in the development of programmes for the proposed tourism FET College which will be tested against demand etc. The strategy also identifies that there is a shortage of accredited training providers available and there are significant gaps in the availability of providers geographically, where many provinces and geographic areas do not have accredited providers within reach. The strategy also makes reference to the distribution of training opportunities geographically which is seen as very biased toward urban centres and more urbanized and advanced provinces. Rural areas, even those with significant tourism assets and products, are at a significant disadvantage. By locating an FET in uThukela which is an inland area with a rural nature, this will aid with increasing the geographic spread within rural areas and create opportunities within rural areas thereby moving away from the urban bias as mentioned through the Tourism Human Resource Development Strategy. The National Rural Tourism Strategy 2011 also recognises education and skills enhancement and capacity building as well as research and information as key areas of intervention. This project therefore also aligns with the National Rural Tourism Strategy by allowing for support and awareness creation to people in rural areas to undertake tourism activities and become involved in tourism.

Table 19: SKILLS GAP - HARD TO FILL POSITIONS

SECTOR	POSITION	SKILLS GAP
Hospitality	Management Waiters Chefs Cooks Cashiers	<ul style="list-style-type: none"> The full range of communication skills across all occupational categories Broad-spectrum (full range) of customer/guest relations skills – across all occupational categories Computer skills (usage of various computer programmes, including specialised hospitality software for some occupational categories) for technicians and associate professionals, professionals, senior officials/managers and clerks in particular Occupationally specific skills for: <ul style="list-style-type: none"> Sales people Front of house reception staff Cleaners and accommodation service workers Financial managers HR/IR professionals Culinary workers (chefs and cooks)
Travel & Tourism	Travel Consultants Managers Tour Drivers Tour Operators Tour Manager	<ul style="list-style-type: none"> GDS/Central reservation training or travel consultants Developing appropriately skilled tour guides and tour operators (full range of occupationally specific skills) The full range of critical skills for tour guides and tour operators, viz. <ul style="list-style-type: none"> Communication Computer skills (usage of various computer programmes as well as industry-specific programmes) Guest relations Security skills
Gaming & Lotteries	Managers / Supervisors IT Personnel	<ul style="list-style-type: none"> Occupationally-specific skills for surveillance and security personnel, including monitoring skills and equipment operating skills as well as guest relation skills Communication skills and HR-specific skills (such as implementing the HR needs of an organization and knowledge of labour legislation) for HR personnel Gaming payout skills for slot operators Communication and computer skills (usage of computer programmes) for senior officials and managers Communication and computer skills (usage of computer programmes) for senior officials and managers

SECTOR	POSITION	SKILLS GAP
Sports, Recreation & Fitness	Fitness Trainer / Instructor Sales Assistant Barman Aerobics Instructor Managers / CEO	<ul style="list-style-type: none"> Communication and public relations skills for clerks, security/maintenance personnel, senior managers/officials, professionals and technicians Computer skills (using various computer programmes) for senior officials and managers and clerks Management and leadership skills (occupationally-specific) for senior managers and officials Development of financial managers (all occupationally-specific skills) Sales, customer handling, sport best practice and office management skills for technicians
Conservation & Tourist Guiding	Supervisors / Managers / CEO Tour Guides Sales Taxidermist Rangers	<ul style="list-style-type: none"> Computer skills (various computer programmes) for technicians, senior officials/managers and elementary workers Financial management skills for technicians Communication skills for technicians, clerks, tourist guides and life sciences Professionals/ rangers General supervisory and operations management skills for senior officials and managers Guest relation skills for technicians, clerks and elementary workers Office management skills for technicians and clerks Understanding the importance of nature conservation – field rangers Supervision and training skills for clerks and senior officials/managers Occupationally specific cleaning skills for elementary workers Front of house skills for clerks

Source: Table Reconstructed from Tourism and Sports Skills Audit Final Report 30 June 2007

The importance and background to this project has been highlighted above has been imperative to the growth and sustainability of the tourism industry in uThukela DM through utilizing tourism education as a means for developing the tourism industry. The purpose will therefore be to create an enabling environment for human resource development and skills enhancement through the provision of a Hospitality and Tourism Educational FET centre in the District. The demand and importance of this project has been seen through the interviews and workshops held during the process of formulating the strategy. The importance and need for tourism and sector based FET colleges especially in areas of rural nature have been advocated through the National Tourism Human Resource Development Strategy as well as commitment by the President of South Africa to mainstream sector educational development. In keeping with National priority and evident need for a tourism sector educational facility, it is recommended that a Hospitality and Tourism Educational Centre be developed in UThukela DM as an opportunity to foster sustainable and responsible tourism growth and development in uThukela and surrounding districts to contribute to tourism provincially.

8.5.1.1 Legal Environment

The governing acts for a project as such are Act No. 52 of 2000; Adult Basic Education and Training Act, 2000 and Act No. 16 of 2006: Further Education and Training Colleges Act, 2006 and the proposed tourism educational centre therefore needs to align to these acts. The Skills Development Act No 37 of 2008 and the National Qualifications Framework Act No 67 of 2008 are also recommended for issues of compliance. All finances to be managed under the Public Finance Management Act [Act No. 1 of 1999] and Municipal Finance Management Act [Act No. 56 of 2003]. Key documents would include the National Tourism Human Resources Development Strategy 2008 and THETA sector skills plan. Green Paper on Further Education and Training, 1998 is also an important to take into consideration and to inform the project.

8.5.2 Project Scope/description

The proposed project is the development of a Hospitality and Tourism Educational Centre in uThukela District Municipality. The project will entail both construction of a new FET college in terms of **Act No. 16 of 2006: Further Education and Training Colleges Act** as well as the operation of the facility. This project can be described as having both physical and human resource requirements. The physical component is the construction of an educational centre to deal specifically with tourism related human resource development and skills enhancement, with the size and specifications to be recommended through the feasibility and business plan stages of the project. The human resource requirement deals with the staffing etc. needed to

manage and operate the facility. Buy in from surrounding businesses is recommended to create a successful initiative. This project has two ownership options; it can be either run as public entity or private college. The feasibility study will determine the best option for uThukela given the inherent circumstances. This project will also aim to bridge the gap between tourism monopolies within the district and emerging SMMEs with regard to skills and capacity through mentorship. Mentorship may need to be spurred by incentives which will need to be investigated.

Key components of this project include:

- training, mentoring and skills transfer programmers;
- assistance to tourism related entrepreneurs in achieving their strategic business goals by supplying access to finance, partnership opportunities and /or consulting expertise; and
- Creating formal linkages in the greater tourism industry.
- create an enabling environment for emerging tourism businesses by providing programmers and initiatives intended to facilitate growth, increase economic participation, forge public and private sector linkages and stimulate the tourism second economy as well as to enhance general tourism human resource development (e.g. In the hospitality industry) thereby empowering small tourism businesses with skills to grow and sustain their businesses to assist in reaching targets for job creation.
- The initiatives conceived and managed by this center need to be cultivated and arranged in a manner so as to be effective to emerging tourism businesses at every stage of their development.
- These programmes vary from initiatives focusing on training and skills development to market access programmes and one-on-one business mentorship programmes and will therefore aid in transformation of the tourism industry in uThukela and surrounding areas.
- Ultimately, an inadequate spread and lack of representivity are the primary societal factors. Since tourism is rife throughout uThukela DM, tourism entrepreneurs are likely to access a large amount of tourists and tourist- related activities which will provide the basis for the need for tourism skills and entrepreneurial development.
- This project therefore entails a tourism educational centre which will attend to skills needs according to a skills audit and demand. A hospitality school will be integrally set up and potential satellite offices identified throughout the district. This can be done in partnership with an accredited institution.
- This project may also aim to educate and be aligned to community and consumer and product owner awareness programmes making it even more sustainable.
- It is important to note that the exact tourism related programmes will be decided through a demand and skills analysis which ideally need to come from the feasibility study and business plan as programmes and modules would need to be formulated in accordance with the guidelines provided by CATHSSETA (available on www.theta.org.za).
- Pending results of the proposed feasibility studies, it is recommended that full scale colleges and centres only be established once the demand has risen. This will work in relation to the success of the tourism industry and ability to absorb trained and skilled personnel. As a starting point, a structure should respond to current demand and space for future expansion should be allowed for. The institution can opt to have satellite offices in future if demand permits, for example hospitality schools linked to existing hotels and tour guide training offices (which may not require a huge facility).
- Research programmes will be linked to this proposed initiative.

8.5.3 Competitive/Comparative Advantage

This project will allow uThukela and surrounding areas to have a competitive tourism advantage with regard to skills development and training by contributing to a knowledgeable and well-tailored tourism industry to ensure service excellence and quality experiences. Other than hotel schools tourism dedicated educational centres are rare to find. Given the fact that the tourism industry is a growing sector which contributes substantially to the economy and aids with socio – economic development and contributes to increasing the quality of life of many, this industry needs to achieve service excellence with its given potential to be fostered. The surrounding International and provincial tourism linkages create an even more wide spread threshold for tourism education as the surrounding districts are rife in tourism potential and existing development and demand (examples are, the Midlands Meander, Battlefields through Amajuba DM, UMzinyathi DM, the Free

State, Maloti - Drakensberg Trans Frontier conservation area and Maloti Drakensberg Route which creates an international link with Lesotho). It is important to note that a tourism educational centre in uThukela will not only benefit uThukela but the above mentioned surrounding districts as well. As mentioned above the National Tourism Human Resource Development Strategy advocates that there is an urban bias toward tourism educational facilities. By locating the FET College in uThukela it will contribute to creating equality in the geographical spread of tourism educational facilities to rural outlying areas.

8.5.4 Activities to be undertaken

1. Solicit funding for and commission a feasibility study, business and operational plan to be undertaken for the establishment of the proposed educational centre.

This step involves creating a foundation for the proposed project. Firstly it is mandated that a feasibility and business plan be completed prior to implementation and application to establish an FET centre and secondly it is imperative to commission these plans as they will direct the project in detail. This phase of the project will entail a skills audit, and needs/demand analysis. Out of this, relevant skills programmes and learning outcomes will be determined and developed accordingly. The main purpose of this planning stage is to determine whether or not the project is viable enough to carry through to future stages. The feasibility study and business plan will aid in determining interested role players to the project which is imperative to lobby for funding and will enhance the feasibility of the project. Another defining factor which is envisaged to come through the feasibility study and business plan is whether or not it is recommended that the institution be operated as a public or private initiative. Once the business plan is completed an operationalization plan needs to be formulated which could be included in the business plan. The feasibility study will be commissioned initially and if the project is deemed feasible, a business and operational plan will be completed. These steps will involve identification of potential sites for the development as well as potential funders

Step	Task	Key Performance Indicators	Implementing Agent
1	Identify key role players such as Department of Higher Education, CATHSETA, National Skills Development Fund, TIKZN, THETA, surrounding communities etc. to partner with and involve in the process	Role Players Identified	uThukela DM
2	Source funding	Funding secured	
3	Write Terms of Reference and conduct a tender process	TOR formulated	
4	Appoint a service provider	Service provider appointed	
5	Implement and manage the formulation of a feasibility study from initiation to completion through monitoring and evaluation tools such as PSC meeting	<ul style="list-style-type: none"> Number of PSC meetings held Feasibility study complete 	
6	Determine way forward (if the project proves to be feasible, then continue to next activity – that is, develop a business and operational plan for the proposed facility) the exact same process will be followed for formulation of the business and operational plan to be formulated.	Business and Operational Plan Complete	

2. **Secure funding for the establishment of the proposed tourism hospitality and educational centre if deemed feasible.** This step is important when undertaking the next activity as it has to be proved that funding is available to sustain the construction and operation of the tourism education centre. The business plan will aid with this. As mentioned this activity also deals with securing funding for the operationalization of the proposed centre with staffing requirements and costs etc. The main activity here is to lobby funding from potential role players as identified through the previous planning stages. The project steering committee and uThukela DM are the implementing agents and responsible for securing funding for the establishment. The business plan can be submitted to various funding agents such as through the National Skills Development Fund to lobby for funding.

3. **Establishment of a Public or private college in terms of Act No. 16 of 2006: Further Education and Training Colleges Act.**

This activity is essential in determining whether or not the structure is constructed. The responsible parties as determined through the business and operational plan will need to undertake this activity. Compliance will be dealt with in more detail by referring to the respective legislation and compliance needs to be ensured. Once this is accomplished, the next step follows,

- **Undertake the development of tourism courses and programmes in line with CATHSSETA** (documents to be found on www.theta.org.za) and obtain accreditation for courses. The application process for accreditation needs to be undertaken in line with CATHSSETA processes. Quality assurance must be conducted by Umalusi in terms of the General and Further Education and Training Quality Assurance Act, 2001 (Act No. 58 of 2001).

4. Construction of the hospitality and educational centre.

This activity involves soliciting funding for the establishment of the physical centre and overseeing the construction process. This activity will follow the construction project life cycle.

5. Operationalize the tourism educational centre.

This activity deals with the actual operation and management of the tourism education centre which includes staffing requirements and implementation of the relevant programmes and tourism SMME support rendered. Mentorships will also be a part of this step.

8.5.5 Key Performance Indicators

The key performance indicators identified for the proposed project which will enable the implementing agents to monitor the project are as follows:

1. Role players identified
2. Feasibility study, business plan and operationalization plan completed
3. Funding and buy-in from role players secured
4. Hospitality and tourism educational centre established
5. Number of applicants and spaces filled
6. Percentage of staff requirements fulfilled
7. Number of businesses supported and mentored

8.5.6 Indicative Budget/ Cash Flow and Time Frame

The total budget envisaged for this project is ± R 20 million. This is a capital project and will include costs for the following activities:

Project Phases	Indicative Budgets
Phase 1: Planning	
• Feasibility studies (including demand analysis and skills audit),	• R 300 000
• Business and operationalization plans,	• R 300 000
Phase 2: Execution	
• Detailed designs,	• R 2 mn
• Construction of the facility(including contingencies, professional fees and other costs),	• R 12 mn
Phase 3: Operationalization and Monitoring and Evaluation	
• Implement operational plan and staff costs (including maintenance, stationary, other educational material, printers and other office and classroom equipment etc.),	• R 5 mn
• Maintenance / Monitoring and evaluation.	• R 100 000 per annum

This budget will vary according to design specifications and requirements for the functioning of the facility (size of facility and décor, types of material being used etc.). The actual size of facility will be determined through the feasibility and business plan. The table below shows an indicative yearly cost estimate breakdown for a five year period.

Yearly Budget Breakdown (DM Responsibility)						Yearly Budget Breakdown (Outsourced Funding)						Total 5 year Budget (DM + Other)
2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (DM)	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (Other)	
R 500 000	0	0	0	R 0	R 500 000	R 0	R 1 000 000	R 900 000	R 700 000	R 2 500 000	R 19 500 000	R 20 000 000

8.5.7 Envisaged SMME and Transformation Potential

SMME support and inclusion of previously disadvantaged persons are fully supported through this initiative as it provides a platform for support and exposure to educational opportunities through bursaries and to become actively involved in research and pursue a career in tourism development. The centre is envisaged to assist with business support and training. this proposed educational centre will not only education and skill people but create windows for opportunities in the working world through practical experience through mentoring and an allied procurement strategy for students and interested entrepreneurs. By locating the institution in uThukela it provides accessibility for the outlying areas and disadvantaged people to become involved in tourism and skills enhancement for purposes of becoming involved on tourism and therefore opens up opportunities and creates positive career perceptions about tourism.

Approximate employment figures which will be created through the construction process as well as the operational process of the facility as indicated by an Input-Output Multiplier Model used, are indicated in the tables below based on a capital injection of R 20 million. The indicators include new business sales, Gross Value Added, Income Multipliers, and employment multipliers. For the capital and operating multipliers, the new business sales turnover is almost triple the amount injected into the establishment of the facility and employment indicators show a large number of opportunities opening up for job creation through this initiative.

Capital Multiplier Outputs	Total	Direct	Indirect
New Business Sales	R 55 763 580	R 24 741 131	R 31 022 449
Gross Value Added	R 19 812 081	R 8 187 294	R 11 624 787
Income Multipliers	R 9 779 818	R 4 336 435	R 5 443 382
Employment Multipliers	122	69	54

Table 20 – Multipliers for the construction process derived for the capital input of R 20 million (Source: Urban – Econ Input - Output Model 2010)

Operating Multiplier Outputs	Total	Direct	Indirect
New Business Sales	60 630 224	22 053 441	38 576 782
Gross Value Added	21 942 922	5 593 732	16 349 190
Income Multipliers	11 477 930	4 817 653	6 660 278
Employment Multipliers	190	125	64

Table 21 - Multipliers for the operating process derived for the capital input of R 20 million (Source: Urban – Econ Input - Output Model 2010)

8.5.8 Role Players and Potential Funding Sources

The following role players have been identified as having a role to play in the development of a Tourism FET centre in uThukela DM:

- uThukela DM, Dept. of Higher Education, FEDHASA, CATHSSETA, National Skills Development Fund, TIKZN, DBSA, DEDT, THETA.
- **Technical Financial Assistance Fund** (www.tikzn.co.za) The TAF is a financial assistance programme established to support projects which promote economic development within KZN Province. The fund assists businesses to develop a bankable business plans from all sectors which requires funding that can be sourced from any of the available development financial institutions and other financial institutions with risk appetite for diverse projects and not restricted only to KZN Growth Fund. It must be noted that this fund is only intended for enterprises which seek to start or expand viable projects in priority sectors biased towards the KZN Provincial Growth and Development Strategy (PGDS).

8.5.9 Physical and resource requirements

The below example provides an indication of the type of requirements that will be needed for the proposed facility. This example is taken from subject guidelines by Department of Education, toward a National Certificate (Vocational): Tourism Operations NQF Level 3, 2007. The same requirements are indicated for other NQF levels.

RESOURCE NEEDS FOR THE TEACHING OF TOURISM OPERATIONS LEVEL 3

(Recommended per group of 15 – 20 students)

1) Physical resources

The following teaching aids should be made available, if possible:

a) Practicum room or simulator

- A practical room (e.g. a front office, or a tourism information centre, etc.) which is a simulated tourism office environment, equipped with the basic office furniture and equipment, as well as the necessary electronic equipment, e.g. computer(s), printer, telephones, fax machines, photocopier, etc.
- Two-hole punch and stapler, ideally per workstation
- Filing cabinet
- Brochure stand(s)
- Counter top/workstation/reception counter as applicable
- Display boards
- The latest developments in electronic equipment must be available
- The computer(s) must be equipped with internet connection to enable website browsing for research purposes, as well as software training programmes, e.g. for making reservations
- At least one computer (with colour printer and connected to the Internet) equipped with a DVD-writer for presentations
- Storeroom facility for Portfolios of Evidence (PoEs), ideally directly connected to the simulator venue for easy access.

b) Classroom

- Classroom/lecture venues for use of Tourism students, where the tourism industry 'feel' can be created by means of maps, posters, wall decorations, industry magazines, etc.
- TV monitor and DVD/VCR
- DSTV satellite dish and decoder with connection (for Travel Channel, National Geographic etc.)
- Computer and data projector and screen
- Flash disk for facilitator to store information
- Presentation programme on computer to be used by facilitator to provide students with visual information on learning outcomes
- Digital video camera (with necessary connections and memory cards)
- Wall clocks (minimum 5) on which to explain time zones/world times

- Larger-than-usual desks/tables, since Tourism students work with documents, maps, atlases, reference books etc.
- Reference books (e.g. Lonely Planet, Rough Guide, and World Travel Guide etc.)
- Dictionaries
- Wall maps (World; Africa Physical and Political; South Africa Physical and Political)
- Atlases and globe
- Overhead projector and pull down screen
- Flipchart
- White board and/or black board
- Storeroom facility for maps and other teaching aids, consumables etc. The storeroom should ideally be situated adjacent to/near the Tourism class room(s) for easy access
- Notice board(s) outside in the corridor(s)

c) **Media/resource centre** (recommended per group of 15 – 20 students)

- A well-equipped media/resource centre
- Availability of computers and printers for students to complete assignments/case studies and do additional research
- Research software e.g. Encarta, etc.
- Subject related magazines (e.g. Getaway, Travel News Weekly, Outdoors, etc.), daily newspapers and subject related reference books for research by facilitators and by students
- Subject related DVDs/videos
- Copies of applicable tourism legislation/Acts
- Stock room to store

2) **Human resources**

a. **Lecturers/facilitators**

- Facilitators with a tertiary qualification (or qualification at NQF Level 7) in Travel and/or Tourism; or Hospitality, preferably with relevant industry experience
- In cases where tourism industry experience is non-existent, it is strongly recommended that such a facilitator does some part-time work in the tourism industry, e.g. during college holiday periods, in order to gain practical work experience
- It will be to the advantage of facilitators/lecturers if they have already been declared competent as assessors and/or moderators
- Training in OBE
- Partnerships should be established with the industry to augment facilitation in certain specialized areas where the appointed FET facilitator/lecturer lacks the necessary expertise
- Outsourcing for modules such as First Aid
- Specific facilitator(s)/lecturer(s) trained to manage the simulator/practicum room activities
- Fundamentals facilitator: Regarding the IT component of Life Orientation it is strongly recommended that the particular facilitator should adapt the learning material to address the needs of computer use in the tourism industry.
- Full time technology and research manager (with knowledge of computers, website browsing, research and reference books)

b. **Other resources**

- Access in the computer classrooms (for each Tourism student) to a computer and printer and the Internet
- Iveco bus – 20 seater for educational excursions and projects

c. **Consumables**

- Learning material/text books
- Answer books, with examples which students must complete for practical assignments
- Basic calculator for each student

- Lever arch file for each student to serve as PoE
- Lever arch file for Practical Assessment Portfolio
- Subscription fees for internet, subject related magazines, newspapers, TV license
- Disks
- CD's
- Ink cartridges (black and colour)
- Transparencies and –pens
- Glossy paper
- Standard office stationary (pens, tippex, etc.)
- Plastic sleeves
- Dividers
- Relevant reservations registers and related tourism documents
- Log books

8.5.10 Conclusion

The above section discusses the importance of tourism education and need for a tourism educational centre which will not only serve uThukela DM but surrounding areas as well. Sufficient detail has been provided with regard to conceptualising the project and providing a descriptive analysis of what the process will require. It is recommended that the district immediately take the following steps:

- Identify stakeholders and secure buy-in into the process, through a structured (PSC) discussion or through the district forum and proposed regional tourism forum,
- Investigate possible locations with careful consideration for land ownership etc. and discuss through a PSC of interested and affected parties,
- Lobby for funding for a feasibility study and business plan (this will only be necessary if the district has not been allocated a budget large enough to accommodate for the feasibility and business plan),
- Once funding is made available, commission the study in a timeframe of 4 months on average,
- Thereafter, secure funding for the establishment of the facility,
- Once the facility is constructed, ownership needs to be dealt with accordingly and handed over to responsible party,
- Once the owner has taken possession the facility would need to be operational as soon as possible.

All attempts by the DM need to be made to proactively lobby for funding, if funding is not available and would need a strong and inspired leader to carry through the facilitation of the project.

8.6 Project5.2.6. Develop a Regional Tourism Organisation incorporating the District Tourism Forum

8.6.1 Project Background and Purpose

A major challenge facing tourism in uThukela is the unequal and fragmented institutional support and marketing of tourism products, which is a contributing factor to the uneven and fragmented growth in the tourism sector in the district. A key opportunity that arises from this regard is to create strong, unified and integrated institutional and organisational structure to coordinate tourism marketing and development activities.

Problem Statement: In reference to the above statement, a defining challenge facing tourism in uThukela is the weak and fragmented institutional structure which directly affects marketing and tourism product development actions. There is also a general lack of tourism support and capacity in the local municipalities, as well as the district municipality. This is compounded by limited coordination at the district level to manage shared resources, initiatives and role players. Weak coordination relates to both institutional arrangements

and with regard to tourism development and marketing as well as regulation. Stakeholders have identified the need to work in synergy to achieve integrated and strong tourism linkages and growth and development. The challenge identified are not new to the tourism situation in uThukela DM, it was identified in the 2007 tourism strategy. Marketing has emerged once more in 2012 as a key issue with regard to the fragmented institutional structure.

Uneven Institutional Structuring: According to the KZN Tourism Master plan 2012, it is mandatory that each LM has a LTF and it is optional to have a CTO **IF** there is a strong district tourism association. At the district level the DTF is underperforming, there is poor participation from the LMs at the district forum meetings. This is in part due to the uneven institutional structuring at the LM level: Okhahlamba LM and uMtshezi LM are the only two LMs with Community Tourism Organisations (CTOs), Emnambithi Municipality and Imbabazane LMs are the only two municipalities which have Local Tourism Forums (LTFs). This institutional unevenness reflects the need for the district municipality to assist coordinate the structures. To this end it is suggested that a District/ Regional Tourism Association be established. An effective management structure is necessary if tourism is to be effective within the UThukela DM. The proposed structure will link the DM Tourism Structures, with its LM'S, local tourism bodies (e.g. CTO's, NGO's) as well as provincial tourism bodies (eg, TKZN, DEDT, and DAC) and allow for interaction with private sector tourism firms and operators.

Recommendation: The recommendation for a reformed district tourism institutional structure, a unified body pooling all district related matters together and providing a platform for tourism development and coordination as well as developing the relationship between private and public sector. This will culminate in a single District Tourism Entity to be established, that is the Regional Tourism Association (RTO) which acts as a municipal entity⁵⁹ is managed by private sector stakeholder to also consist of the existing public sector District Tourism Forum (R.T.F/D.T.F) which will be made to be operational. This entity would undertake the tourism marketing and development actions required in the District, integrating the diverse attractions and experiences into a unified message aimed at attracting domestic and international tourists to uThukela.

8.6.2 Institutional Structure in Legal Environment

The R.T.O is envisaged to function as a Municipal Owned Entity established in terms of the Municipal Structures Act No. 117 of 1998, Municipal Systems Act No. 32 of 2000 and Municipal Finance Management Act No. 56 of 2003, where the municipality has ownership but the private sector manages and operates the entity. This structure is envisaged to integrate and strengthen relations between the public and private sector as per legal requirements stipulated for the formation of a municipal entity.

8.6.3 Project Scope

8.6.3.1 Main Aim

To establish a single institutional structure, a municipal entity, consisting of the **Regional Tourism Organisation (RTO)** and supporting the **District Tourism Forum (DTF)**.

This will enable the private and public sectors to function efficiently and for all interests to be represented. The proposed institutional structure will also achieve a strong and united tourism marketing action integrating the diverse attractions and experiences into a unified message aimed at attracting domestic and international tourists.

⁵⁹ According to the Municipal Systems Act, a municipal entity is defined as a company, co-operative, trust, fund or any other corporate entity established in terms of any applicable national or provincial legislation and which operates under the ownership control of one or more municipalities. And includes, in the case of a company under' such ownership control, any subsidiary of that company; or a service utility.

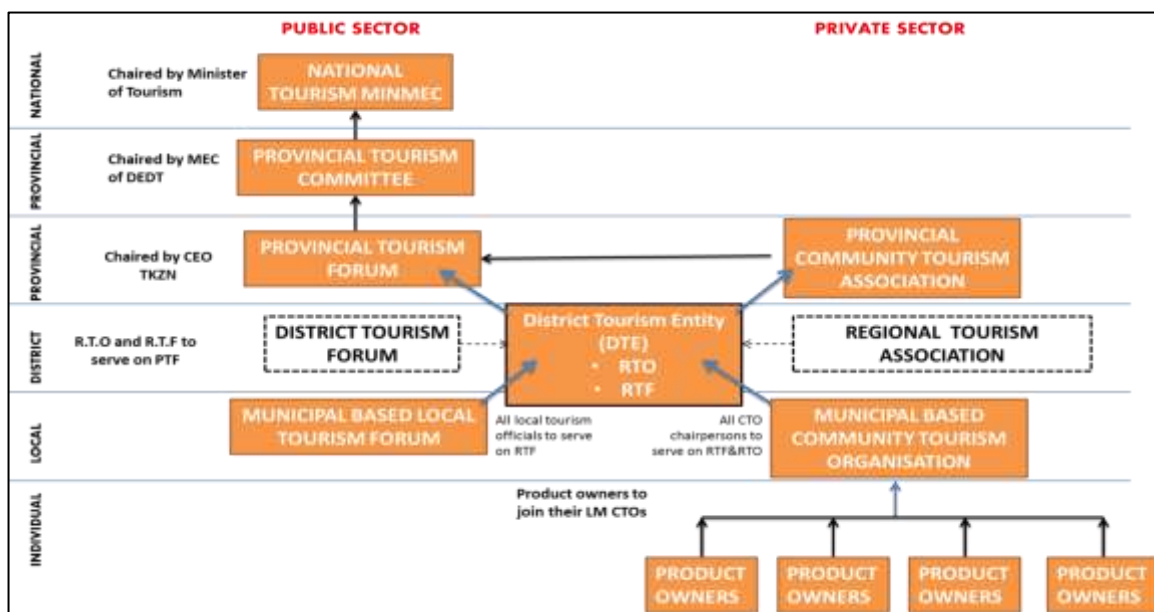
8.6.3.2 Objectives

1. Establish a Regional Tourism Association as a municipal entity which links private sector interests and existing Community Tourism Organisations (C.T.O.s)
2. Operationalize District Tourism Forum which represents public sector interests

8.6.3.3 Single District Tourism Entity (RTO+RTF)

The project therefore entails a single tourism body at district level with **two defining components**, the **District/Regional Tourism Forum (DTF)** to fully represent the public sector and the **Regional Tourism Association (RTO)** to fully represent the private sector with the RTO functioning as a municipal owned entity.

The district entity lies on the principle of combining public and private sector to strengthen relationships and provides cohesion. The relationship between private and public sectors needs to be identified and it is through the suggestions of this project that this comes through. The private and public sectors are interrelated and need one another to function effectively. It is imperative that both private and public sector work together to make tourism successful in UThukela DM. The diagramme below illustrates the institutional structure proposed with the proposed single district body lying at the core of tourism in uThukela DM. This institutional



structure and inter relations have been aligned to the KZN Tourism Master Plan 2011.

As indicated by uThukela District Municipality: Tourism Development Plan 2007, considerable amounts of land and property are managed by the local authorities, developing these resources necessitates the involvement of the local authority. And therefore for the private sector, entering partnerships with local authorities provides them with partners of good standing, who are able to share risks associated with development projects (especially when in their initial stages of development).

The **Roles and Functions** of the partnership are therefore proposed as follows:

- Responsibly manage the financial workings of the organization and make appropriate allocation of funds (from institutions and the private sector) for marketing and development
- Take responsibility for budgets for the purpose of providing support for development projects, capacity building and infrastructure
- Raise funds for specific projects that require financial support over and above grants made by the UThukela Municipality
- Lobby and secure extra funding that may be needed
- Represent and manage the collective tourism interests of the communities within the

- UThukela Municipality area
- Manage key destination marketing and developmental processes and actions.
- Interact directly with the tourism related authorities namely; DAC, TIKZN, TKZN, DEDT, COGTA, SAT, National Department of Tourism, N3 Gateway, MDR, Open Africa etc. the Local and the DM structures
- Foster important cross boundary relationships with other provinces, district and countries (Lesotho)
- Make policy recommendations to council that may affect local bylaws and regulations
- Act as a regional tourism authority encompassing all tourism bodies, association and authorities
- Take full and active responsibility for the implementation of the uThukela Tourism Development Strategy 2012.

8.6.3.3.1 Meetings

It is recommended that the RTO and RTF meet on regular basis with the RTO having a representation on the RTF and the chairman of the RTF having representation on the RTO to ensure a strong relationship and between public and private sector as well as integration and consensus of tourism concerns in uThukela DM. Frequency of meetings will have to be determined through the business plan and deliberations with the DM.

8.6.3.4 Regional Tourism Association/Organisation (RTO, RTA)

The R.T.O is envisaged to function as a Municipal Owned Entity established in terms of the Municipal Structures Act No. 117 of 1998, Municipal Systems Act No. 32 of 2000 and Municipal Finance Management Act No. 56 of 2003, where the municipality has ownership but the private sector manages and operates the entity. The RTO should provide a secretariat function to the District Tourism Forum in order for it to function appropriately.

8.6.3.4.1 Roles and Functions

The main roles of the municipal entity (R.T.O) are as follows:

- Manage and Market tourism in uThukela, including strategic marketing of events, places and other attractions within the district
- Promote tourism growth and development
- Motivation of projects (product development)
- Running of all information offices (branding, marketing outreach, distribution)
- Appoint CEO and staff
- Provide a secretariat function to the R.T.F
- Membership Update and Signing up of New Members
- Provide Tourism Advise to Existing and New Members
- Coordinate Training and Workshop for participants in the Tourism Sector
- Monitor Compliance to District and Local Tourism Policies by established and new entrants to the tourism industry
- Administrative responsibility to ensure the operations contribute towards the realization of the Council's goals and objectives,
- Facilitation and co-ordination of activities for all local publicity associations and Community Tourism Associations within the local areas of jurisdiction when necessary.
- Conducting and commissioning of surveys on tourism issues within the district.
- Commissioning of feasibility studies on tourism products.
- Maintaining close links with related public and private sector agencies.
- Budget monitoring and key performance system in place to monitor and evaluate system
- Research and development
- Investment packaging

- Liaison with all tourism stakeholders (authorities, tourism bodies, communities etc.)
- Monitoring of service standards
- Route development and operations.
- Database development.
- Statistical analysis.

8.6.3.4.2 Marketing

With regard to marketing the RTO needs to deliberate on the members involved in marketing of the district. This would include the following role players, but is not limited to these:

- N3 gateway
- Open Africa
- Maloti-Drakensberg Route
- Battlefields Route Association
- Existing Community Tourism Organisation in uThukela (Bushmans River Tourism Association, Okhahlamba Tourism Association)
- Existing development agencies (Okhahlamba Development Agency)
- Ezemvelo KZN Wildlife
- Tourism KwaZulu-Natal
- Chambers of Commerce
- Surrounding districts tourism associations and bodies
- Any tour guide associations
- All other tourism bodies and associations involved in tourism affecting tourism directly and indirectly in and around uThukela DM.
- The previously disadvantaged communities need to be included with a view to allowing them an understanding of tourism marketing.

The marketing responsibilities of the new association should be concerned with, but are not limited to the following:

- Ensure marketing of the destination and product development
- Determination of marketing slogans, themes and approaches
- Create a unified approach to marketing in the districts
- Foster diverse marketing tools and methods most effective to target market segments which will range according to attraction and area
- Conduct research and development of tourism in uThukela DM as well as continuous research of market segment needs and community needs with regard to tourism
- Coordination of roll out and management of agreed marketing tools
- Preparation and implementation of marketing strategies and projects
- Evaluation of marketing strategies and outcomes
- Tourism signage management and monitoring
- Evaluation of funding for promotion applications
- Facilitate event support programmes
- Attendance of international and national trade shows
- Publicity and media coordination and exposure as well as national and international recognition
- Bid presentations for events and MICE opportunities
- Special delegation trips
- Attendance of tourism management meetings
- Visitor information services- operation and provision.

8.6.3.4.3 Physical and Human Resource Requirements

The proposed district tourism entity will have physical and staffing requirements.

8.6.3.4.4 Proposed Staffing requirements of the RTO

The recommendations made here are in accordance with the 2007 Tourism Development Plan prepared for uThukela District Municipality after being reviewed and amended to current situations in uThukela DM.

The staffing of the Regional Tourism Organisation is critical to the success of the organization. Any staff appointments need to be purely based on tourism expertise and knowledge of the tourism environment in uThukela and the person should have a vested interest in tourism in the district. No appointment should be on a political basis and the board of members ideally should come from the private sector.

Key competencies of staff (Director) would include:

- Proven training and experience in tourism and tourism management, marketing and development
- Experience in tourism and tourism management
- Effective written and verbal communication and presentation skills
- A Media and PR track record
- Computer literate
- Proven experience in key decision making forums and high level tourism management entities
- Outstanding business management skills
- Fundamental knowledge of the tourism industry in UThukela DM
- Other functions such as Office administration and financial record keeping, brochure development, marketing strategy development and administration, events planning and implementation, and assessments of membership registration as well as management of district tourism information office.

Functions would include:

- Manage and administer the operations and programmes for proposed RTO
- Liaise with political personalities and tourism stakeholders
- Attend tourism management meetings within the UDM area and elsewhere
- Represent the UDM area at trade shows and tourism promotion opportunities
- Coordinate media and publicity/awareness campaigns
- Liaise with product owners and CTOs with regards to local tourism issues
- Drive developmental projects
- Ensure that UDM departments activate key requirements in the best interests of tourism

It is suggested that the salary for such a person would be paid by the District with a performance contract being applied as part of the employee package.

8.6.3.4.5 Physical Requirements

The RTO may need a residence to operate from and hold meetings as well as to keep all admin related resources and databases. This could be integrated with the District Information office, however, if it cannot there needs to be an office and office equipment to regulate the operations of the RTO. This will also be linked to an operational budget. Also a website would need to be created in line with the proposed website through the marketing strategy.

8.6.3.5 Existing Community Tourism Organisations (CTOs)

The existing CTOs will retain a strong component of autonomy in that they will be able to:

- Still operate their own visitor centres
- Jointly or severally be able to promote their local tourism assets at trade shows

- Retain their own local management committee.
- Promote and manage events as fund raising opportunities
- Create their own localised marketing tools with funding from the proposed RTO, however, must comply to the district tourism branding and image

Each will be able to nominate a representative to the Regional Tourism organisation hence acting as a representative to bring local issues to the attention of the UThukela DM.

8.6.3.6 District/ Regional Tourism Forum (RTF, DTF)

This forum represents the public sector interests in uThukela DM, where all local municipalities need to be fully represented. The existing Local Tourism Forums need to be represented. It is imperative as a function of this body, it is seen to by the district that all local municipalities have a tourism officer designated for tourism functions and that Local Tourism Forums are formed in all local municipalities. The district shall provide support to LMs that are finding it difficult to form these forums and operationalize them.

The current district forum is not functioning well; this means that the current forum will need to be operationalized through an appropriate evaluation and operational plan with an agreement to be signed by all local municipalities with penalties for non-compliance.

It is proposed that the RTO will provide a secretariat function to the forum. It is imperative that the local municipalities take an active interest and are involved in this process. If the current situation continues, the districts might have to put in measures to ensure compliance from local municipalities. Duties will include the following:

- Planning of tourism infrastructure development
- Monitoring of tourism infrastructure development
- Planning of capacity building programs
- Monitoring of capacity building programs
- Implementation of capacity building programs
- Ensure maintenance of tourist services, sites and attractions and public services by local municipalities and aid with dilemmas experienced
- Ensure maintenance of database of registered tourism products and service providers by local municipalities
- Driving the development of and implementation of local tourism policy
- Urban and rural planning and development of tourism products and services
- Budget for the effective implementation and growth of tourism in line with the Provincial objectives
- Allocate Institutional capacity and dedicated and skilled Human resources to perform tourism function
- provision of local infrastructure
- Creation and co-ordination of tourism experience routes across its district and beyond municipal boundaries
- Providing Tourism support to entrepreneurs and investors

8.6.3.7 Other key Considerations:

- That all LM's in the DM be represented.
- All municipalities to contribute towards the operations of as well as marketing of a unified district tourism entity.
- The DTF component of the DTE should fully represent the public sector
- The RTO component of the DTE should represent the private sector and with the district having an honorary seat
- There needs to be the appointment of a dynamic tourism director and board of members with expertise and efficiency.
- There needs to be a dynamic marketing executive to drive the process.
- The concerns of the private sector need to be acknowledged.

- There needs to be a focus on both marketing and product development.
- The district municipality needs to advertise and fill vacant positions
- The adoption of the terms of reference for the new entity.

8.6.4 Activities to be undertaken and Anticipated Outcomes

Below are two tables which indicate activities and KPIs for each objective identified above that is establishment of the RTO and operationalization of the DTF.

Activities to be undertaken for the establishment of the Regional Tourism Organisation	Key Performance Indicators (KPI)	Implementing agents
1. Stakeholders and role players need to be identified from Private Sector	Role players identified	uThukela DM
2. The Department of Economic Development and Tourism needs to be consulted	DEDT consulted	uThukela DM
3. A business plan needs to be drawn up with organisational structures and funding lobbied for the formation of the R.T.O and operationalization of the D.T.F/R.T.F.	Business Plan formulated	uThukela DM
4. Operationalization/Implementation plan for the DTE and more specifically the RTO needs to be developed: <ul style="list-style-type: none"> • The District Council must resolve on the establishment of the entity • Advertise for nomination Board of Directors and the CEO • UThukela to fast track implementation within the legal limits with an M&E system in place • Existing associations are to carry on functioning until the single tourism body is established 	<ul style="list-style-type: none"> • Operationalization/Implementation plan implemented • Public consultation with a mandatory meeting per local municipality (5 meetings/workshops) 	Proposed RTO
5. A constitution, and detailed roles and responsibilities needs to be drawn up for the R.T.O municipal entity and board members elected	<ul style="list-style-type: none"> • Constitution and TOR completed • RTO established and agreements signed 	uThukela DM
6. A office needs to be set up for the RTO	Office established	uThukela DM

Activities for District Tourism Forum	Key Performance Indicators	Implementing agents
District Tourism Forum to be operationalized through the development of a detailed terms of reference for the Forum, agreed upon with the LMs and DM, and an MOA for full participation from all local municipalities.	District tourism Forum Operational <ul style="list-style-type: none"> • LMs and DMs sign MOA and TOR for Forum • Number of meetings held • 100 % representation of local municipalities • Number of tourism initiatives embarked on and funding secured • Agreements to participate signed by LMs 	uThukela DM

8.6.5 Envisaged SMME development and Transformation potential

The outcomes of the district tourism entity include a fully representative forum and RTO with the intention of being inclusive in decision making with a community orientated approach which aims to also benefit local

stakeholders. For example, the DTE (district tourism entity) will not only benefit the private sector but aspiring tourism communities as well. The region will be marketed to have trickle down effects to local SMMEs and businesses.

8.6.6 Cash Flow

The cash flow indicated below is indicative of the amount that would need to be set aside for the formulation of the District Tourism Entity. The initial R 300 000 would need to be used for the formulation of a business plan for the proposed project. The remainder will be used for establishment of the entity and all operational costs incurred as well as start-up finance needed to mobilise the entity, drawing up of terms of reference, establishment of the office to operate from, staffing and other office equipment etc. The funding for the operation and set up of the district entity can be lobbied and secured from IDC, DEDT, and other potential sources of funding as listed below. An operating expense is estimated at R 750 000 per annum. Please note that the budgets and cash flow presented below are purely indicative and are subject to change and will be investigated in the feasibility study.

Yearly Budget Breakdown (DM Responsibility)						Yearly Budget Breakdown (Outsourced Funding)						Total 5 year Budget (DM + Other)
2012/ 2013	2013/ 2014	2014/ 2015	2015/ 2016	2016/ 2017	Total (DM)	2012/ 2013	2013/20 14	2014/ 2015	2015/2 016	2016/ 2017	Total	
R 300 000	0	0	0	0	R 300 000	R 0.00	R 1 450 000.00	R 750 000	R 750 000	R 750 000	R 3 700 000.00	R 4 000 000.00

8.6.7 Role Players

Linkage to other projects	This project is linked to all projects identified directly and indirectly
Implementing Agent/s	uThukela DM, service providers, LMs , all tourism associations
Potential Funding Sources	IDC, TIKZN, uThukela DM, DEDT, COGTA

8.6.8 Conclusion

The above project details and description has attempted to provide the district with the overall project scope and description however, with enough flexibility to implement the project according to the districts internal operations and needs as well as political circumstances. It therefore does not attempt to dictate on membership fees or how many officials need to be represented in a district forum etc. these details will be provided by the detailed business plan and TOR for the district entity drawn up as part of the process. The district initially as a first step needs to identify role players to this initiative, by using the PSC member contact details for the UThukela Tourism Strategy 2012 as a starting point and alert DEDT of the plans for a single tourism body and formulation of the municipal entity. Concurrently plans need to be drawn to operationalize the existing District Tourism Forum, which could additionally act as a forum for the deliberation of the municipal entity. Public notification and communication needs to be made on the proposed municipal entity

and single tourism body. A business plan then needs to be drawn up if the concept is favoured by majority of the decision makers.

The formulation of this proposed project includes the following advantages:

- The UThukela District Municipality has the opportunity to interact and communicate with one tourism orientated body in an equitable and responsible manner.
- The generic tourism needs and the development of district specific marketing tools can be met/carried out.
- There will be the streamlining of horizontal and vertical institutional alignment.
- The relationship between private and public sector will be fostered
- The lobbying of funding for tourism projects (for operations and projects) will be better coordinated with the appropriate endorsements and political support.
- Projects and actions can be prioritised via a consensus approach with collective community buy in.
- Such a body will be able to participate fully in the application of this Tourism Management Plan and take fundamental decisions regarding its implementation
- Improved marketing exposure
- A unified tourism industry
- A streamlining of resources
- Avoid duplication of projects
- Avoid market confusion

Key actions

The key actions to be taken by the district are as follows:

- a) Identify stakeholders and invite to meetings and workshop the proposed project with the outcome of the process will be consensus (and general buy-in) and a plan of action to take the next step,
- b) Apply for funding for a business plan to be undertaken,
- c) Submit the recommendation to all LM and DM Councils.
- d) If the proposal is supported by council then follow the steps as provided in the Municipal Finance Management Act [Act No. 56 of 2003], Chapter 10, Part 1, section 84(1) in establishing a Municipal Entity:

84. (1) When considering the establishment of, or participation in, a municipal entity a municipality must first:

- (a) determine precisely the function or service that such entity would perform on behalf of the municipality; and
- (b) make an assessment of the impact of the shifting of that function or service to the entity on the municipality's staff, assets and liabilities including an assessment of-
 - a. the number of staff of the municipality to be transferred to the entity;
 - b. the number of staff of the municipality that would become redundant because of the shifting of that function or service
 - c. the cost to the municipality of any staff retrenchments or the retention of redundant staff
 - d. any assets of the municipality to be transferred to the entity;
 - e. any assets of the municipality that would become obsolete because of the shifting of that function or service,
 - f. any liabilities of the municipality to be ceded to the entity; and
 - g. any debt of the municipality attributed to that function or service which the municipality would retain,

(2) A municipality may establish or participate in a municipal entity only if-

- (a) the municipal manager, at least 90 days before the meeting of the municipal council at which the proposed establishment of the entity, or the municipality's proposed participation in the entity, is to be approved-

- (i) has, in accordance with section 21A of the Municipal Systems Act-

- (aa) made public an information statement setting out the municipality's plans for the municipal entity together with the assessment which the municipality must conduct in terms of subsection (1); and
 - (bb) invited the local community, organised labour and other interested persons to submit to the municipality comments or representations in respect of the matter and,
 - (ii) has solicited the views and recommendations of-
 - (aa) the National Treasury and the relevant provincial treasury;
 - (bb) the national and provincial departments responsible for local government and
 - (cc) the MEC for local government in the province; and
 - (b) the municipal council has taken into account-
 - (i) the assessment referred to in subsection (1);
 - (ii) any comments or representations on the matter received from the local community, organised labour and other interested persons;
 - (iii) any written views and recommendations on the matter received from the National Treasury, the relevant provincial treasury, the national department responsible for local government or the MEC for local government in the province.
- (3) For the purposes of this section, "establish" includes the acquisition a n interest in a private company that would render that private company a municipal entity.

8.7 Project 2.1.12. Investigate the development of a Cableway as an iconic signature project in line with the KZN Tourism Master Plan

8.7.1 Project Background and Purpose

The Department of Economic Development and Tourism as identified this project for a detailed feasibility study to be managed by the department. This concept plan covers only the context of the proposed project. If for any reason the feasibility is not commissioned, then the district can seek funding to institute that feasibility study be carried out. The outcomes of this feasibility study will direct the future of the project. It has been established that Ezemvelo KZN Wildlife has supported the feasibility study phase of the proposed development.

This project has been proposed for many years as a concept with the proposed location being the Mnweni Valley. This priority project is further identified through the KwaZulu-Natal Tourism Master Plan as the development of an iconic natural scenic tourism experience as a major draw card to the KwaZulu-Natal Province.

According to the KZN Tourism Master Plan⁶⁰, the Province will consider developing iconic "signature" projects, i.e. catalytic projects that will make a significant visual and perception impact, projects that enhance the product and experience related to the core experiences. The recommended possible iconic projects for the province as listed in the KZN Tourism Master Plan are provided below and the one of concern is highlighted:

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

⁶⁰ The KZN Tourism Master Plan has been carried out in 2011, however, the process has continued to 2012 for finalisation of the strategy.

	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.

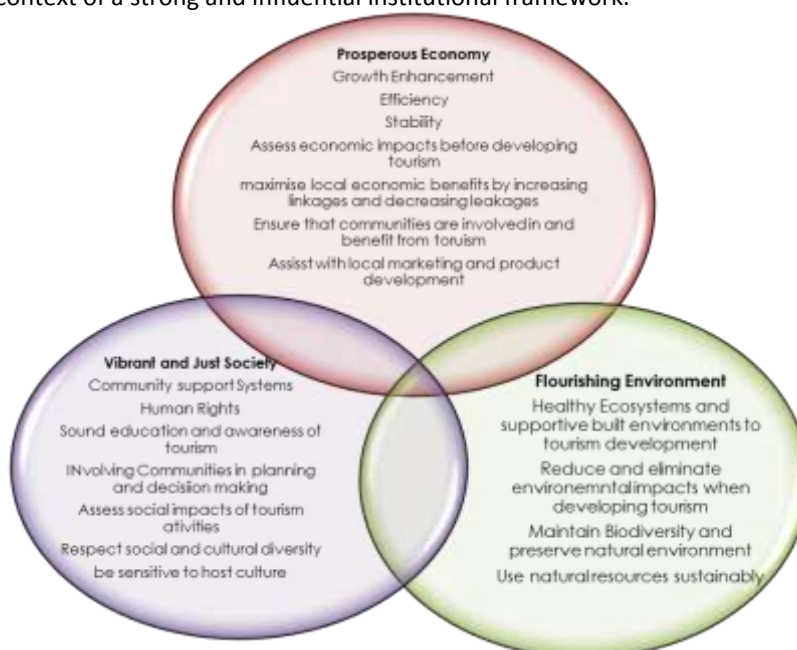
Table 22 – A list of possible iconic projects with specific attention to the 'Drakensberg cable Car (Source: KZN Tourism Master Plan Executive Summary pp.: 44)

As indicated this project is centred on the natural features of the uKhahlamba-Drakensberg World Site. Given that the project is identified through the province, it is evident that it is envisaged to have a larger sphere of influence and major impact provincially and hence nationally.

Location: There are however many thoughts on the possible location from varied stakeholders, such as the Okhahlamba Development Agency. Currently the proposed location of Mnweni Valley is no longer an option for many reasons including environmentally sensitive areas, and alternate locations need to be investigated. One of the proposed locations is the Amazizi Community area. The location will be identified through the feasibility study.

8.7.2 Project Scope

The district needs to monitor the proposed project to ensure that proposals fall within and address the sustainable development⁶¹ framework as illustrated below with a balance between the three main objectives; to foster a prosperous economy, vibrant and just society and flourishing environment. This all needs to be undertaken in the context of a strong and influential institutional framework.



8.7.3 Activities to be undertaken

- The district has no funding implications at this stage assumed that DEDT will commission a feasibility study for the proposed project.
- The district needs to keep abreast with the outcomes and process of the feasibility and ensure involvement in the process to provide input into the process
- It is recommended that the district ensure that thorough consultation is undertaken throughout the process – consultation with all interested and affected parties including communities
- Other activities that may arise from the project are as follows:

⁶¹ According to the Brundland Commission (WCED 1987) as: "Development that meets the needs of the present without compromising the ability of future generations to meet their own needs".

- Support can be provided for an Environmental Impact Assessment carried out in terms of the National Environmental Management Act (NEMA) Act No. 62. of 2008 and other environmental applications and regulations that may exist for the land,
- Clarity on ownership of land will need to be identified through municipal planning and legal implications thereof,
- The local planning ordinances will also need to be adhered to,
- Stakeholder mobilization through local tourism bodies including the proposed R.T.O, existing C.T.Os, and existing Local Tourism Forums etc.

8.7.4 Conclusion

The District Municipality officials and councillors should proactively participate in the process when the feasibility is carried out and ensure compliance with the sustainable development agenda as well as thorough community participation.

9 Conclusion and Way Forward

This report has dealt with the formulation of the uThukela District Municipality Tourism Development Strategy. The strategy includes a comprehensive Situational Analysis of Tourism in uThukela DM which culminates into S.W.O.T Analysis. The main challenges and opportunities are identified from the S.W.O.T Analysis which then leads to the development of an overall strategic framework for tourism development in uThukela DM and recommendations on the institutional structure at a strategic level, with defined roles and responsibilities of stakeholders to aid with implementation. This framework was based on an extensive consultation process held throughout the project, including workshops, surveys, PSC meetings, research, and individual interviews.

The main strategic clusters identified for uThukela tabulated below provide a full spectrum of tourism interventions and actions that need to take place in order for tourism in uThukela to be more progressive.

Strategic Cluster/Goal	Strategic Thrust
Strategic Cluster/ Goal 1: Marketing-Develop an effective and efficient marketing system to increase visitor numbers into uThukela Marketing - tourism growth and development (demand)	Strategy 1.1: Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution
	Strategy 1.2: Ensuring route development, branding and marketing cohesion
	Strategy 2.1: Develop and Enhance Core nature based tourist experience aligned with KZN Tourism Master Plan (iconic natural scenic tourism experiences)
Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion	Strategy 2.2: Develop Niche Tourism Experiences to contribute to a diverse and unique tourist experience
	Strategy 2.3: Enhance Tour Operating services, hospitality and accommodation to support the uThukela tourism industry
	Strategy 2.4: Ensure Investment promotion of tourism in uThukela
	Strategy 2.5: Enhance safety and security in the district to support crime free tourism in uThukela
	Strategy 2.6: Promote and Accommodate Accessible tourism
Strategic Cluster/Goal 3: People Development-To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence.	Strategy 3.1: Encourage and ensure transformation of the uThukela tourism industry
	Strategy 3.2: Stimulate a tourism culture through tourism awareness and education across the district
	Strategy 3.3: Ensure Quality Tourist Experiences and service excellence
Strategic Cluster/Goal 4: Tourism Infrastructure Investment Framework-To create a favourable built tourism environment to become conducive to growth and development and to boost investor confidence	Strategy 4.1: Maintain and upgrade Transport (road, air and rail), communication and Services infrastructure to create a conducive tourism environment
	Strategy 4.2: Maintain and facilitate provision of Signage to direct visitors in and around uThukela
	Strategy 5.1: Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry
Strategic Cluster/Goal 5: Policy, strategy, governance, research & knowledge	Strategy Enhance tourism through institutional

management monitoring and evaluation- To create an enabling institutional environment through knowledge management, developing collaborative partnerships and producing planning and regulatory measures

- 5.2:** arrangements, collaborative partnerships, communication and policy
- Strategy 5.3:** Promote responsible tourism and green principles in tourism development
- Strategy 5.4:** Provide a sustainable Planning framework to guide future tourism development and investment

For each of the strategic thrusts identified above, a set of projects were identified (for which an implementation plan was prepared), and from these the list of priority projects chosen are provided below and incorporates a monitoring and evaluation framework for each project. The list of priority projects were work shopped.

Strategic Thrust	Project/Intervention
Strategy 1.1. Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution	1.1.2 Create an Events Calendar and strategy for District and coordinate and lobby the use of local SMMEs to deliver for events
	1.1.4 Appoint service provider to develop a district tourism website with a data base of all attractions, and products as well as potential investments
Strategy 1.2. Ensuring branding and marketing cohesion	1.2.1 Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars
	1.2.6 Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela
Strategy 2.1. Develop and Grow Core tourism experiences (Nature-based and eco-tourism)	2.1.1 Provide support to the upper uThukela Stewardship process - Support the development of the upper uThukela region and community conservation areas and nature reserves to allow for eco-tourism and allied initiatives
	2.1.4 Investigate the expansion and consolidation of Weenen Game Reserve and investigate potential as a Big Five Game Reserve
	2.1.5 Provide Support the restoration of Umsuluzi Game Reserve near Colenso
	2.1.7 Provide support and engage linkages to Trans-Maloti Trekking Trail and MDR
	2.1.8 Upgrade Rock Art Centres in Okhahlamba and link environmental interpretation centre
	2.1.12. Investigate the development of iconic natural scenic tourism experiences such as the Cableway in line with the KZN Tourism Master Plan
Strategy 2.2. Develop Niche Tourism Experiences (Adventure and Sport, Avitourism, Township and Rural Tourism, cultural and heritage tourism and community based tourism)	2.2.4 Investigate potential and impact for rail tourism in light of the KZN Rail tourism Feasibility study with Ladysmith as main station
	2.2.6 Identify and develop key existing and potential Township and Rural Tourism projects: modelled on the best case example of Mpophomeni
	2.2.24 Create a themed heritage and cultural route along R74 (Mpofana – Weenen – Umsuluzi – Colenso) in according with Provincial Spatial Planning Guidelines
	2.2.27 Support MICE tourism by packaging investment project for a conference venue in Emnambithi/Imbabazane/Okhahlamba/Escourt
	2.2.30 Support Craft and Visual Arts exhibition in partner with Dept. of Arts and Culture
Strategy 2.3. Tour Operating services, hospitality and accommodation	2.3.1 Facilitate the reconstruction of the Royal Natal Hotel
	2.3.4 Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /centre

Strategy 2.4. Ensure Investment promotion of tourism in uThukela	2.4.3 Develop an investment promotion strategy and incentives policy and package potential projects in collaboration with TIKZN
Strategy 2.5. Enhance safety and security in the district to support crime free tourism in uThukela	2.5.1 Engage SAPS in tourism awareness and tourist protection in uThukela DM involving all LMs
Strategy 2.6. Promote and Accommodate Accessible tourism	2.6.2 Development and promotion of universal accessibility tourism standards and apparatus and marketing of accessible tourism
Strategy 3.1. Encourage and ensure transformation of the uThukela tourism industry	3.1.1 Conduct a baseline study and transformation plan for uThukela Tourism with a M&E system
	3.1.2 Facilitate continuous SMME and Business Support to tourism role-players (e.g. Crafters) through a development programme
	3.1.5 Develop a local procurement strategy linked to local SMMEs and local product owners and investigate Development and Retail of Arts and Crafts for export and through exhibitions in partnership with chain stores
Strategy 3.2. Foster a tourism culture through tourism awareness and education across the district	3.2.2 Facilitate a district tourism skills audit and development plan to guide and involve LMs
	3.2.3 Create a district wide strategy for tourism education and awareness programmes (career choice perception) for interested and passionate communities and school children to be rolled out per LM (See proud Schools project) in partner with an educational institution
	3.2.4 Facilitate the establishment of a hospitality and tourism training and development centre in the district in partner with recognized tourism training centres with satellite offices
Strategy 3.3. Ensure Quality Experiences and service excellence	3.3.5 Develop a system of grading and standards through the Tourism Grading Council of South Africa or SATOUR and linked to CATHSSETA for all accommodation, catering and other service providers including info centres to obtain baseline, provide guidelines, and ensure compliance through an annual monitoring and evaluation system of improvements (e.g. tourism inspector)
Strategy 4.1. Maintain and upgrade Transport (road, air and rail) and Services infrastructure to create a conducive tourism environment	4.1.1 Facilitate and ensure continuous upgrade of R74 with Free State
	4.1.4 Upgrade and maintain the road to Spioenkop (R181)
Strategy 4.2. Maintain and facilitate provision of Signage to direct visitors in and around uThukela	4.2.6 Develop a district wide tourism and advertising signage policy, investment and communication framework to systematically guide allocation maintenance and provision of signage (inclusive of Battlefields signage).
Strategy 5.1. Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry	5.1.1 Formulate a knowledge management strategy and system for collating and presenting information and visitor statistics to track demand include audit of the amount of jobs/employment figures currently occupied in all tourism related initiatives as well as revenue earned with an M/E system in place.
	5.1.4 Develop a district tourism information system and database of all tourism attractions and products that is constantly updated and accessible to all stakeholders and make available on proposed website
Strategy 5.2. Enhance tourism through institutional arrangements,	5.2.6 Develop a Regional Tourism Organization incorporating the District Tourism Forum
	5.2.10 Oversee that ALL local municipalities are equipped with a tourism official

collaborative partnerships, communication and policy	as per Provincial requirements
Strategy 5.3. Promotion of responsible tourism and green principles in tourism development	5.3.5 Ensure that green principles are incorporated into new tourism developments and investigate incentives for the incorporation of green principles/ link to grading and award system
Strategy 5.4. Provide a sustainable Planning framework to guide and fastrack future tourism development and investment	5.4.1. Facilitate fast tracking of planning processes (e.g. Development approval processes) as well as land auditing and land availability database to enable development to occur

Six projects were chosen from the priority list above for the purpose of concept plans to be drawn up, through a prioritization process as well as a district workshop. The Six projects that were chosen from the list above are:

- Project 1.2.1. Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars
- Project 1.2.6. Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela
- Project 2.3.4 Develop a themed tourism information node/Hub including a district craft hub with shops and job opportunities along N3 and N11 (or main tourism routes) to include an entertainment area /center
- Project 3.2.4 Facilitate the establishment of a hospitality and tourism training and development center in the district in partner with recognized tourism training centers with satellite offices
- Project 5.2.6. Develop a Regional Tourism Organization incorporating the District Tourism Forum
- Project 2.1.12. Investigate the development of a Cableway as an iconic signature project in line with the KZN Tourism Master Plan

Nevertheless, all projects that have been identified are seen as imperative to take place at some point as they respond to the needs and challenges faced by the tourism industry in uThukela as identified throughout the project. The six main actions that have been elaborated on are highlighted to take place immediately to unlock latent tourism potential and grow the existing tourism industry. However, other identified priority projects can take place subsequently which are listed in the table above.

The way forward is for uThukela to carry through the recommendations made in order to improve tourism in UThukela DM and to ensure responsible and sustained tourism development in the future with a knowledgeable and informed tourism sector with a diverse and unique tourism mix of activity.

With this conclusion it is recommended that this strategy be adopted and carried through as a guiding document for tourism development in uThukela DM with priority projects to be effective immediately.

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Available accommodation, attraction, crafters, calendar of events, performers and other service provider databases obtained from uThukela DM, EKZNW, AMAFA, TKZN, Emnambithi-Ladysmith Municipality, UMtshezi LM, Imbabazane LM, Indaka LM, and Okhahlamba LM

Annexure 1: Summary Matrix of all Projects Identified

This section presents the summary matrix of projects identified and evaluation process of identifying priority projects. This list is divided by the respective goals, and will continue for the next ten pages, thereafter the monitoring and evaluation framework exists for the priority projects emanating from the list below. The tables in Annexure 1 provide a summary of all projects identified for uThukela DM tourism sector. It includes a timeframe, type of project, and project evaluation scoring. These are explained as follows:

Type of project: projects are broken down into three types, namely:

- **Facilitation:** This type of project involves the DM having to enable tasks to take place by organizing and getting stakeholders together, usually creating a platform for coordination of stakeholder's communication to take place.
- **Capital:** these types of projects usually involve a project which needs to be built by a contractor hired through a tender process and involves labour intensive and physical infrastructure based projects.
- **Planning:** these types of projects entail the formulation of a strategy, feasibility or business plan to guide future tourism developments.

Project Evaluation: This evaluation is based on the assessment criteria developed and presented above. It is indicative in nature and may change with perceptions. It will determine the urgency of the project to be implemented.

Time Frame: The time frame indicates whether the project is a short, medium or long term project.

- **Short term:** Short term indicates that a project needs to be started immediately within the first 3 years of the strategy (0-3 years) as a need of urgency to take place immediately,
- **Medium Term:** Medium term indicates that a project can take place anytime with 5 years of the adoption of the tourism strategy (0 – 5 years) as a less urgent project with which some time can lapse before the project is undertaken,
- **Long Term:** Long term timeframe indicates that the project can take place at any time within a long term framework of 10 years (0- >5 years) as the project is seen as not as urgent or is a long term project that may be started early but operates for a long period of time.

Strategic Cluster/ Goal 1: Marketing-Develop an effective and efficient marketing system to increase visitor numbers into uThukela Marketing - tourism growth and development (demand)							
Interventions / Projects							
Strategy 1.1	Improve general marketing in UThukela through varied marketing tools, information offices and adequate distribution	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
1.1.1	Formulate a distribution strategy to ensure distribution of marketing material to areas of importance and key exposure (airports, service stations, convention centres, businesses etc.)	1.2.1	Facilitation	1			
1.1.2	Create an Events Calendar and strategy for District and coordinate and lobby the use of local SMMEs to deliver for events	1.1.15, 1.1.16, 3.1.5	Facilitation	1			
1.1.3	Develop a district magazine with adverts of all attractions and service providers	1.1.1, 1.2.1	Facilitation	3			
1.1.4	Appoint service provider to develop a district tourism website with a data base of all attractions, and products as well as potential investments	1.2.1, 5.1.1, 5.1.4	Facilitation	1			
1.1.5	Ensure that Indaba, Imbabazane, have information offices with designated information officers	1.1.6	Capital	3			
1.1.6	Ensure that info offices are in attractive condition to attract visitors	1.1.5	Facilitation	2			
1.1.7	Strengthen/Create relationships with international outbound tour operators that handle the Southern African destinations	1.2.1, 1.1.1	Facilitation	1			
1.1.8	Information distribution to be provided at attractions and through service providers	1.1.5, 1.1.6, 1.2.1, 1.1.1	Facilitation	3			
1.1.9	Engage communities in marketing initiatives at service stations, local businesses etc.	1.2.1	Facilitation	2			
1.1.10	Area marketing project through packaging of experiences for travel agents and other marketing databases (eg. Gift ideas see www.giftday.co.za)	1.2.1	Facilitation	2			
1.1.11	Ensure alignment with demand through constant research on market segments needs and trends and market accordingly by considering varied marketing tools in line with the KZN Tourism Master plan (e.g. ICT) both on an international and national scale		Facilitation	1			
1.1.12	Package tourism targeted at the niche tourism sectors in relation to core experiences		Planning	2			
1.1.13	Encourage participation in film and other festivals both nationally and internationally		Facilitation	3			
1.1.14	Introduce social networking and ICT as tools for marketing	1.2.1, 1.1.1	Facilitation	2			
1.1.15	Coordinate additional events in support of Music and other festivals	1.1.2	Facilitation	3			
1.1.16	Provide support and recognise events as a form of exposure	1.1.2	Facilitation	1			
1.1.17	Ensure constant updating of brochure and continued market research and documentation of history and culture of the district as a whole and what it has to offer	1.2.1	Facilitation	2			
1.1.18	Ensure participation through Indaba, by designated stand and advertising as part of TKZN and N3 gateway, Open Africa stand	1.2.1	Facilitation	1			
1.1.19	Promote visibility through marketing tools such as influential travel magazines (eg. Country life, WWW)	1.2.1	Facilitation	1			

Strategic Cluster/ Goal 1: Marketing-Develop an effective and efficient marketing system to increase visitor numbers into uThukela Marketing - tourism growth and development (demand)							
Strategy 1.2	Ensuring Branding and Marketing cohesion	Linkage with project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (3 - 5 years)	Long Term (>5years)
1.2.1	Develop a district marketing strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars	1.1.1, 2.6.2	Planning	1			
1.2.2	Create partnerships and become a member of N3 Gateway and Open Africa to create an integrated and linked form of marketing and relationship with surrounding destinations	1.2.1	Facilitation	1			
1.2.3	Develop the N11 as a route integrated with Amajuba	1.2.5 + 1.2.6	Facilitation +Planning	3			
1.2.4	Promote Bushman's experience route in partnership with Open Africa	1.2.6	Facilitation	1			
1.2.5	Develop Nguni Route development along N11 with Open Africa	1.2.6	Facilitation	1			
1.2.6	Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela	1.2.7, 1.2.3, 1.2.4, 1.2.5, 1.2.10, 1.2.12, 2.2.2, 2.1.6, 2.2.7, 2.1.13, 2.2.15, 2.2.24	Planning	1			
1.2.7	Investigate the possibility of a religious route to be developed along Emnambithi, Van Reenen etc.	1.2.6	Planning	3			
1.2.8	Promote the brand for the district 'the Soul of the Zulu Kingdom' and ensure alignment by all affiliated with the district and enforce brand alignment and usage on all marketing material	1.2.1, 5.2.23	Planning	1			
1.2.10	Create themed Route Development along R74 and R103 in line with proposed district route plan	1.2.1	Planning	3			
1.2.11	Engage experience based marketing to cover all attractions- Market and brand Drakensberg, battlefields and other attractions to work in synergy	1.2.1, 1.2.8, 5.2.23	Planning	1			
1.2.12	Provide support to the Cannalibism route in Indaka and investigate linkages to UMTshezi and UMzinyathi	1.2.6	Planning	2			
1.2.13	Facilitate the creation of a RTO to handle marketing as a primary function amongst other functions	5.2.6, 5.2.23	Planning	1			
1.2.14	Formulate a strategy to market the district throughout S.A and internationally through trade shows, road shows, various media, conferences etc.	1.2.1	Planning	1			
1.2.15	Identify alternative marketing tools to be developed through a marketing strategy which is demand and supply driven	1.2.1	Planning	1			
1.2.16	Facilitate the joint and cross promotional marketing of district as a whole in conjunction with all stakeholders (TKZN, South Africa Tourism private, public etc.)	1.2.1	Planning	1			
1.2.17	Limit branding and synergise with macro brands	1.2.1, 5.2.23, 5.2.6	Planning	1			
1.2.18	Investigate the Twinta Trail as an opportunity for route development in Okhahlamba LM		Planning	3			

Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion								
Interventions and Projects								
Strategy 2.1	Develop and Grow Core tourism experiences (Nature-based and eco-tourism)	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5 years)
2.1.1	Support the development of the upper uThukela region and community conservation areas and nature reserves to allow for eco-tourism and allied initiatives	Okhahlamba LM		Capital	1			
2.1.2	Facilitate linkages with Sterkfontein Dam Nature Reserve	Free State		Planning	3			
2.1.3	Investigate and support eco-tourism initiatives at Ngelegele Community Game Reserve	Imbabazane LM		Capital	3			
2.1.4	Investigate the expansion and consolidation of Weenen Game Reserve and investigate potential of a Big 5 Game Reserve	Umtshezi		Facilitation	1			
2.1.5	Provide Support the restoration of Umsuluzi Game Reserve near Colenso	Umtshezi		Planning	1			
2.1.6	Provide Support and engage in linkages to Maloti-Drakensberg Route (Marketing as well) through signage and funding	Lesotho-uThukela		Facilitation	1			
2.1.7	Provide support and engage linkages to Trans-Maloti Trekking Trail and MDR	Lesotho-uThukela		Planning	2			
2.1.8	Upgrade Rock Art Centres in Okhahlamba and link environmental interpretation centre	Okhahlamba LM		Capital	2			
2.1.9	Recognise Maloti-Drakensberg Route as a pivotal conduit for tourism activity in the Northern Berg							
2.1.10	Develop an environmental interpretation centre in the district linked to a nature/game reserve	T.B.D		Capital	2			
2.1.11	Identify areas if environmental significance and plan and engage in rehabilitation initiatives in partnership with Buffer Zone Technical committee	T.B.D		Planning	1			
2.1.12	Investigate the development of a Cableway as an iconic signature project in line with the KZN Tourism Master Plan	Okhahlamba LM		Capital	1			
2.1.13	Develop the R616 - R600 as a scenic route (Spionkop Battlefield – Bergville – Mnweni – R600 Spionkop Nature Reserve) in accordance with provincial spatial planning guidelines	Okhahlamba LM		Planning	2			
2.1.14	Develop a major San interpretation centre and experience linked to Okhahlamba WHS (in accordance with the Tourism Master Plan)	T.B.D		Capital	2			
2.1.15	Develop a scenic tourism plan to guide future scenic tourism development	uThukela		Planning	3			
2.1.16	Investigate and promote eco-tourism as a core experience with related tourist activities (hiking etc.)	uThukela		Planning	2			

Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion								
Interventions and Projects								
Strategy 2.2	Develop Niche Tourism Experiences (Adventure and Sport, Avi-tourism, Township and Rural Tourism, cultural and heritage tourism and community based tourism)	Local Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term(0 - >5years)
2.2.1	Promote golfing experience to suite a wider range of golfers, from leisure golf to professional golfing and promote golfing events	uThukela		Facilitation	3			
2.2.2	Develop an inventory per LM of all hiking routes available and map these	uThukela		Planning	3			
2.2.3	Investigate, identify and promote additional adventure and sporting activities and events such as bungee jumping, foo fee slides, paragliding, hot air ballooning, off road biking, river rafting, abseiling, fly fishing, mountain bike challenges etc.	uThukela		Planning	1			
2.2.4	Investigate potential and impact for rail tourism in light of the KZN Rail tourism Feasibility study	uThukela		Planning	1			
2.2.5	Promote, develop and support MICE tourism	uThukela		Planning	1			
2.2.6	Identify and develop key existing and potential Township and Rural Tourism projects: modelled on the best case example of Mphomomeni	uThukela		Planning	1			
2.2.7	Investigate the potential of avi-tourism and a birding route linked to Maloti Drakensberg Birding route, Amajuba, Okhahlamba, Emnambithi, Van Reenen, and Imbabazane as part of the proposed district wide route	uThukela		Planning	2			
2.2.8	Promote, preserve and foster Cultural, Heritage and religious Tourism	uThukela		Planning	1			
2.2.9	Investigate medical tourism potential near the Drakensburg World Heritage site and Emnambithi LM	Okhahlamba LM/Imbabazane		Planning	3			
2.2.10	Identify existing and additional Community Based tourism development initiatives and provide support	uThukela		Facilitation	1			
2.2.11	Investigate use of dams for recreational purposes such water activities eg. Power boats: Qedusizi Dam	uThukela		Planning	1			
2.2.12	Ensure preservation, maintenance of Battlefields sites	uThukela		Capital	1			
2.2.13	Ensure museums are open 7 days a week	uThukela						
2.2.14	Provide support to 'Mazibuye Emasisweni Cultural Village' to function as a successful community initiative	Imbabazane LM		Facilitation	2			
2.2.15	Facilitate the development of a music academy themed on Ladysmith Black Mambazo and Drakensberg Boys Choir in partner with accredited institutions as well as events and music routes	uThukela		planning	2			

Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion								
Interventions and Projects								
Strategy 2.2	Develop Niche Tourism Experiences (Adventure and Sport, Avi-tourism, Township and Rural Tourism, cultural and heritage tourism and community based tourism)	Local Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term(0 - >5years)
2.2.16	Development and Retail of Arts and Crafts for export and through exhibitions in partnership with chain stores	uThukela		planning	3			
2.2.17	Support Redevelopment of Colenso to substantially contribute to tourism in uThukela and convert cooling towers to act as an interpretation centre and Abyss Swing (Orlando Towers in Soweto)as well as a viewing tower	Emnambithi		planning	2			
2.2.18	Facilitate hosting of international heritage events and conferences in Emnambithi	Emnambithi		planning	2			
2.2.19	facilitate periodic Craft markets at pension pay points and coordinate with events	uThukela		planning	3			
2.2.20	Link proposed Dinosaur Valley to palaeontology tourism at Golden Gate Highlands National Park (Free State)	Free State-uThukela		planning	3			
2.2.21	Promote uThukela as a wedding destination	uThukela	1.2.1	Facilitation	3			
2.2.22	Develop and investigate Agri tourism products	uThukela		Planning	2			
2.2.23	Explore wildlife experiences through promoting and encouraging Big Five Game Reserves in Okhahlamba and throughout the DM	Okhahlamba / uThukela		Planning	1			
2.2.24	Create a themed heritage and cultural route along R74 (Mpopana – Weenen – Msuluzi – Colenso) in according with Provincial Spatial Planning Guidelines	uThukela-Mooi Mpopana		Planning	1			
2.2.25	Establish a multifunction centre at Weenen as a tourism Node	uMtshezi		Capital	1			
2.2.26	Establish Arts and Craft centre in Indaka	Indaka		Capital	3			
2.2.27	Construct a conference venue in Emnambithi/Imbabazane/Okhahlamba/Escort	uThukela		Capital	1			
2.2.28	Zulu Rural settlement and cultural experience in Northern Drakensberg	Okhahlamba		Capital	1			
2.2.29	Rehabilitate Malendeni Bird Sanctuary	Emnambithi		Capital	3			
2.2.30	Support Craft and Visual Arts exhibition in partner with Dept. of Arts and Craft	uThukela		Planning	1			
2.2.31	Create and arrange platforms for live performances in support of performing artists aimed at tourist entertainment	uThukela	2.2.30	Planning	2			
2.2.32	Implement previously identified tourism projects such as Woodstock Dam, Cannibal Caves and Weenen Cultural Centre	uThukela		Capital	3			

Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion								
Interventions and Projects								
Strategy 2.3	Tour Operating services, hospitality and accommodation	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term(0 - >5years)
2.3.1	Facilitate the reconstruction of the Royal Natal Hotel	Okhahlamba		Capital	1			
2.3.2	Package township tours throughout the district	uThukela		Planning	2			
2.3.3	Investigate establishment of accommodation near Lesotho, for hikers in Okhahlamba	Okhahlamba		Capital	3			
2.3.4	Develop a tourism information node/Hub including a district craft hub with shops and job opportunities in line with Thokoza along N3 and N11(or main tourism routes) to include an entertainment area /centre (Aligned to Bridge To Nowhere project)	uThukela		Capital	1			
2.3.5	Encourage additional hospitality service/local restaurants or chain food outlets near tourist attractions	uThukela		Capital	1			
2.3.6	Develop a district wide guided tour programme and Train and develop local specialist tour guides (eg. Birding, township tours etc.) involving all local municipalities based on demand (include local youths from Inkanyezi Township as Battlefield site guides)	uThukela		Planning	1			
2.3.7	Upgrade Kwa Mtabamanyama Resort			Capital	3			
2.3.8	Investigate the viability of constructing a military camp styled accommodation at Spioenkop Resort	Okhahlamba		Capital	3			
2.3.9	Train and develop local youths from Inkanyezi Township to act as Battlefield site guides		2.3.7	Planning	2			
2.3.10	Establish a dedicated tour operating service for the district	uThukela	2.3.7	Planning	3			
2.3.11	Encourage the feasibility of Rural BnB's in all local municipalities	uThukela	2.3.7	Planning	1			
2.3.12	Investigate investment by prestigious brands / hotels at Tendele	Okhahlamba		Planning	2			
2.3.13	Package estate development to include Van Reenen	uThukela		Capital	3			

Strategic Cluster/Goal 2: Product Development and Support Services-Establish and support key Product Development initiatives to enhance the diversity of tourism and to improve the perception of the tourism industry in uThukela and accommodate accessibility tourism and drive investment promotion								
Interventions and Projects								
Strategy 2.4	Ensure Investment promotion of tourism in uThukela	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term(0 - >5years)
2.4.1	Identify and promote means to identify and ensure investor awareness and confidence	uThukela	2.4.3	Planning	3			
2.4.2	Review/develop incentive schemes necessary for tourism investment promotion throughout uThukela	uThukela	2.4.3	Planning	3			
2.4.3	Develop an investment promotion strategy and incentives policy and package potential projects in collaboration with TIKZN	uThukela	2.4..3	Plannin g	1			
Strategy 2.5	Enhance safety and security in the district to support crime free tourism in uThukela	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term(0 - >5years)
2.5.1	Engage SAPS in tourism awareness and tourist protection in uThukela DM involving all LMs	uThukela		Facilitatio n	1			
2.5.2	Develop a safety and security plan for the district	uThukela		Planning	1			
Strategy 2.6	Promote and Accommodate Accessible tourism	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term(0 - >5years)
2.6.1	Awareness creation and skills training to tourism information officers and other front line staff around accessible tourism	uThukela		Planning	2			
2.6.2	Development and promotion of universal accessibility tourism standards and apparatus and marketing of accessible tourism	uThukela		Planning	1			
2.6.3	Engage tour operator involvement with this target market	uThukela		Planning	2			
2.6.4	Ensure tourism developments accommodate physically challenged persons	uThukela		Planning	2			

Strategic Cluster/Goal 3: People Development- To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence.

Proposed Interventions and Projects per Strategy

Strategy 3.1	Encourage and ensure transformation of the uThukela tourism industry	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
3.1.1	Conduct a baseline study and transformation plan for uThukela Tourism with a M&E system	uThukela		Planning	1			
3.1.2	Facilitate continuous SMME and Business Support to tourism role-players (eg. Crafters) through a development programme	uThukela		Planning	1			
3.1.3	Ensure equality of services and exposure to rural and undeveloped tourism stakeholders and service providers throughout uThukela	uThukela		Planning	2			
3.1.4	Ensure fully representative CTOs, RTOs and organisations/forums associations and address language barrier	uThukela		Facilitation	2			
3.1.5	Develop a local procurement strategy linked to local SMMEs and local product owners	uThukela		Planning	1			
3.1.6	Encourage mentoring between emerging and established tourism product owners through an incentive scheme	uThukela		Facilitation	1			
3.1.7	Promote compliance with Tourism B-BBEE sector code	uThukela		Planning	1			
3.1.8	Promote career development and support programmes for previously disadvantaged persons to be rolled out throughout the district	uThukela	3.2.5, 3.2.3	Planning	2			
3.1.9	Develop and implement a campaign to stimulate a culture of travel amongst previously disadvantaged	uThukela		Planning	3			
3.1.10	Identify and support SMME tourism projects that stress on rural tourism development	uThukela	3.1.2	Planning	2			

Strategic Cluster/Goal 3: People Development- To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence.

Proposed Interventions and Projects per Strategy

Strategy 3.2	Foster a tourism culture through tourism awareness and education across the district	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
3.2.1	Engage continuous market research and development through an organised marketing and research plan involving participation of communities (See-Yenza Project)	uThukela	1.1.11, 1.1.17	Planning	2			
3.2.2	Facilitate a district tourism skills audit and development plan to guide and involve LMs	uThukela		Planning	1			
3.2.3	Create a district wide strategy for tourism education and awareness programmes (career choice perception) for interested and passionate communities and school children to be rolled out per LM (See proud Schools project) in partner with educational institutions	uThukela	3.2.5, 3.1.8	Planning	1			
3.2.4	Facilitate the establishment of a hospitality and tourism training and development centre in the district in partner with recognised tourism training centres with satellite offices	uThukela		Capital	1			
3.2.5	Improve tourism and hospitality career choice perception and information for school learners	uThukela	3.2.3, 3.1.8	Planning	3			
3.2.6	Create a 'one-stop-shop' where learners and students can access accurate information preferably at a local library or tourism office	uThukela	3.1.8	Planning	2			
3.2.7	Engage tourism and tourism social awareness and aimed at gearing community for tourism (See Van Reenen Yenza Project and promote road shows)	uThukela	1.2.1	Planning	1			
3.2.8	Promote and develop environmental awareness programmes for communities and schools	uThukela		Planning	1			
3.2.9	Facilitate ICT training and skills development for youth in line with Van Reenen yenza project	uThukela		Planning	2			

Strategic Cluster/Goal 3: People Development- To enrich the tourism industry role-players through skills enhancement and awareness, capacity building, SMME support and transformation and provision of quality Tourism Experiences service excellence.

Proposed Interventions and Projects per Strategy

Strategy 3.3	Ensure Quality Experiences and service excellence	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
3.3.1	Hold workshops on continuous professional development for current tourism staff, Amakhosi and wad councillors	uThukela	3.3.4	Planning	3			
3.3.2	Facilitate and fund training programmes in service excellence for current tourism employees throughout the district.	uThukela		Planning	2			
3.3.3	Facilitate a system of recognition and strengthen relationships between tourism stakeholders through internal events e.g. social events, team building as a district etc.	uThukela		Planning	3			
3.3.4	Develop and implement major periodic training and capacity building programmes for municipal officials, Amakhosi, ward councillors, CTO/LTA officials and staff and encourage professionalism in the tourism industry	uThukela	3.3.1	Planning	2			
3.3.5	Develop a system of grading and standards through the Tourism Grading Council of South Africa or SATOUR and linked to CATHSSETA for all accommodation, catering and other service providers including info centres to obtain baseline, provide guidelines, and ensure compliance through an annual monitoring and evaluation system of improvements (eg. tourism inspector)	uThukela		Planning	1			
3.3.6	Establish service feedback systems	uThukela		Planning	2			
3.3.7	Explaining, lobbying and prioritising the tourism industry with Politician's, Amakhosi and government officials	uThukela		Facilitation	2			
3.3.8	Auditing of illegal and legal products and provide assistance and incentives to legalise products	uThukela		Planning	2			

Strategic Cluster/Goal 4: Tourism Infrastructure Investment Framework-To create a favourable built tourism environment to become conducive to growth and development and to boost investor confidence								
Proposed Interventions/Projects per Strategy								
Strategy 4.1	Maintain and upgrade Transport (road, air and rail) and Services infrastructure to create a conducive tourism environment	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
4.1.1	Facilitate upgrade of R74 with Free State	uThukela/Free State		Facilitation	1			
4.1.2	Ensure ICT infrastructure is prioritised and developed to include 3G networks and access to internet and training	uThukela		Planning	2			
4.1.3	Facilitate regular maintenance and upgrade of roads to tourist attractions in particular R 616, R 600, R 602, R 103, N11, P 341, D364, Ntambamhlope road, roads leading to Escourt and surrounds, Cathedral road, Retief Klip, Barefoot Woman Monument and Bloukrans	uThukela	4.1.6	Planning	2			
4.1.4	Upgrade and maintain the road to Spieonkop (R181)	Okhahlamba		Planning	1			
4.1.5	Upgrade Ladysmith airport to operate more efficiently	Emnambithi		Facilitation	2			
4.1.6	Upgrade and maintain roads leading to Battlefields tourism attractions	uThukela	4.1.3	Capital	1			
4.1.7	Improve road linkages in rural municipalities of Imbabazane and Indaka, and Okhahlamba (ward 13)	Imbabazane/Indaka		Capital	3			
4.1.8	Upgrade (tarring) of D 364 and P 341 as an alternative to Van Reenens pass	Emnambithi		Capital	3			
4.1.9	Upgrade and maintain road to Injusuthi	Imbabazane		Capital	2			
4.1.10	Improve services to rural areas	uThukela		Capital	1			
4.1.11	Ensure infrastructural support to MICE tourism through ICT development and tour operators	uThukela		Capital	1			
4.1.12	Upgrade and maintain road leading to Mnweni cultural centre	Okhahlamba		Capital	1			
4.1.13	Ensure service provision to rate paying service providers and property owners engaged in tourism to make areas conducive and attractive to tourism and further investment attraction	Okhahlamba		Capital	1			
4.1.14	Identify areas of strategic tourism importance and prioritise service delivery (water, electricity, sanitation, waste removal)	uThukela		Capital	1			
4.1.15	Ensure infrastructural support to Oliviershoek Route to link Bergville and Winterton	Okhahlamba		Capital	2			
4.1.16	Start a district wide 'clean up' campaign championed by LMs, guided by DM	uThukela		Facilitation	2			
4.1.17	Provide directive on using sustainable energy alternatives in new developments and at tourism information offices (eg. Solar energy)	uThukela		Planning	1			
4.1.18	Recognise the proposed link road by Okhahlamba Development Agency from Champagne Valley with the Cathedral Peak Valley	uThukela		Facilitation	3			

Strategic Cluster/Goal 4: Tourism Infrastructure Investment Framework-To create a favourable built tourism environment to become conducive to growth and development and to boost investor confidence								
Proposed Interventions/Projects per Strategy								
Strategy 4.2	Maintain and facilitate provision of Signage to direct visitors in and around uThukela	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
4.2.1	Erect Info laphas at all entrances to destinations and local municipalities	uThukela		Capital	1			
4.2.2	Identify, upgrade, maintain and add new and attractive tourism signage throughout the district exposing attractions and towns	uThukela		Capital	1			
4.2.3	Provision of signage along main routes, R616, R73, R 600, R103, R 74 to expose the attractions and towns to passers by and help direct visitors	uThukela		Capital	1			
4.2.4	Provision and maintenance of signage to existing battlefields attractions	uThukela		Capital	1			
4.2.5	Facilitate the provision of signage of N3 and toll road to expose the district to passers by	uThukela		Capital	2			
4.2.6	Develop a district wide tourism and advertising signage policy, investment and communication framework to systematically guide allocation maintenance and provision of signage in line with existing Signage Strategy (eg. forthcoming MDR Signage Strategy) and inclusive of Battlefields signage	uThukela		Planning	1			
4.2.7	Facilitate provision of signage for Drakensberg Experience Route in collaboration with Open Africa and Bushman's River Tourism Association	uThukela		Planning	2			
4.2.8	Facilitate provision of signage for Maloti-Drakensberg Route in accordance to the forthcoming MDR Signage Strategy	uThukela		Planning	1			
4.2.9	Ensure provision of signage to townships and to internal and main roads, throughout the district	uThukela		Capital	3			

Strategic Cluster/Goal 5: Policy, strategy, governance, research & knowledge management monitoring and evaluation- To create an enabling institutional environment through knowledge management, developing collaborative partnerships and producing planning and regulatory measures								
Strategy 5.1	Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry	Municipality	Linkage with Project	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
5.1.1	Formulate a knowledge management strategy and system for collating and presenting information and visitor statistics to track demand, include audit of the amount of jobs/employment figures currently occupied in all tourism related initiatives as well as revenue earned.	uThukela		Planning	1			
5.1.2	Provide bursaries for postgraduate research studies on tourism in uThukela	uThukela		Planning	3			
5.1.3	Mandate registration of all tourism enterprises operating in uThukela with a C.T.O	uThukela		Facilitate	1			
5.1.4	Develop a district tourism information system and database of all tourism attractions and products that is constantly updated and accessible to all stakeholders and make available on proposed website	uThukela		Planning	1			
5.1.5	Partner with a recognised educational centre of excellence to conduct research to be used in tourism development in uThukela as tool to track tourism development	uThukela		Planning	3			
5.1.6	Agree and implement institutional responsibility and capacity for research and information	uThukela		Planning	3			
5.1.7	Implement annual performance plans	uThukela		Planning	2			
5.1.8	Develop a research programme and impact assessments to monitor and measure the attainment of targets and objectives	uThukela		Planning	1			
5.1.9	Align research to regional and national tourism research templates (if or when implemented)	uThukela		Facilitation	3			

Strategic Cluster/Goal 5: Policy, strategy, governance, research & knowledge management monitoring and evaluation- To create an enabling institutional environment through knowledge management, developing collaborative partnerships and producing planning and regulatory measures								
Strategy 5.2	Enhance tourism through institutional arrangements, collaborative partnerships, communication and policy	Municipality	Linkage with Project (if applicable)	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
5.2.1	Formulate a communication plan for collaboration and strengthening of the relationship between public and private sector	uThukela	5.2.2	Planning	1			
5.2.2	Establish a good working relationship with EKZNW, TIKZN, Amafa, Ingonyama Trust, Maloti-Drakensberg Forum through a process/forum to integrate these stakeholders and provide support	uThukela	5.2.1, 5.2.2.1	Facilitation	1			
5.2.3	Develop and implement tourism policy and by-laws on registration of tourism businesses, licences, environmental health issues, public liability insurance, development and location of signage and the location of craft stalls and provide guidance to LMs to formulate by-laws	uThukela		Planning	1			
5.2.4	Ensure adequate staffing is provided at district level	uThukela		Planning	2			
5.2.5	Ensure cross boundary linkages with Free State, Lesotho and Amajuba etc. through Van Reenen, MDR, N3 Gateway	uThukela		Facilitation	1			
5.2.6	Develop a single District Tourism Entity to consist of a District Marketing Organisation / Regional Tourism Organisation and a District Tourism Forum	uThukela		Planning	1			
5.2.7	Provide support to ensure all LMs have tourism sector plans in place	uThukela		Planning	3			
5.2.8	Support Indaka, Emnambithi and Imbabazane to develop operational C.T.Os if needed	uThukela		Planning	1			
5.2.9	Hold a workshop/seminars with all LMs and other stakeholders to define roles and responsibilities	uThukela		Planning	2			
5.2.10	Oversee that ALL local municipalities are equipped with a tourism official and Local Tourism Forum as per Provincial requirements	uThukela		Planning	1			
5.2.11	Demonstrate government support for private sector initiatives	uThukela		Planning	1			
5.2.12	Secure and lobby funding for tourism initiatives and address the need for increased tourism budgets	uThukela		Facilitation	1			
5.2.13	Investigate alternative revenue generating models for tourism funding	uThukela		Planning	2			
5.2.14	Produce a BR&E strategy for tourism businesses	uThukela		Planning	2			
5.2.15	Implement a system to rate and approve tourism projects submitted for funding	uThukela		Planning	2			
5.2.16	Continue to be involved in the Ambassador programme by DEDT by soliciting support	uThukela		Facilitation	1			
5.2.17	Identify bureaucratic challenges and address these	uThukela		Facilitation	1			
5.2.18	Operationalize the District Tourism Forum in conjunction with functioning CTOs and proposed RTO	uThukela		Facilitation	1			
5.2.19	Establish a good working relationship and dialogue with Maloti-Drakensberg Route/MDRP and provide support where needed	uThukela	5.2.2	Facilitation	1			

Strategic Cluster/Goal 5: Policy, strategy, governance, research & knowledge management monitoring and evaluation- To create an enabling institutional environment through knowledge management, developing collaborative partnerships and producing planning and regulatory measures								
Strategy 5.3	Promotion of responsible tourism and green principles in tourism development	Municipality	Linkage with Project (if applicable)	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
5.3.1	Create visitor awareness of responsible behaviour in communities in uThukela and the environment	uThukela		Planning	1			
5.3.2	Awareness and capacity building on responsible tourism for government tourism officials and tourism marketing organisations	uThukela		Planning	2			
5.3.3	Embed responsible tourism messaging in marketing activities	uThukela	1.2.1	Planning	1			
5.3.4	Provide support to tourism businesses and communities to implement responsible tourism	uThukela		Planning	1			
5.3.5	Ensure that green principles are incorporated into new tourism developments and investigate incentives for the incorporation of green principles/ link to grading and award system	uThukela		Planning	2			
5.3.6	Strive towards protection of environmentally and historically significant sites.	uThukela		Planning	1			
Strategy 5.4	Provide a sustainable Planning framework to guide and fastrack future tourism development and investment	Municipality	Linkage with Project (if applicable)	Type of Project	Project Evaluation 1 = High Impact (urgent), 2 = Medium Impact, 3 = Low impact (not as urgent)	Short Term (0 - 3 years)	Medium term (0 - 5 years)	Long Term (0 - >5years)
5.4.1	Facilitate fast tracking of planning processes (eg. Development approval processes) as well as land auditing and land availability database to enable development to occur	uThukela		Facilitation	1			
5.4.2	Identify bureaucratic challenges and obstacles to tourism developments & address these.	uThukela		Planning	1			
5.4.3	Development of a spatial framework with tourism nodes and corridors to focus investment and review every 3-5 years	uThukela		Planning	1			
5.4.4	Develop a land use database for packaging of land to determine vacant land, undevelopable and developable land etc. with GPS coordinates and update regularly	uThukela		Planning	2			
5.4.5	Ensure consultative process with all stakeholder authorities involved in tourism, when planning and new developments are being undertaken (eg. MDR tourism working group, local MDRF cluster)	uThukela		Facilitation	1			
5.4.6	Ensure developments comply with PDA and NEMA (EIA regulations)	uThukela		Planning	1			

Annexure 2: Detailed Annual Cash Flow per Priority Project

The table on the following page provides a detailed budget and yearly cash flow for all the priority projects identified. It also breaks down the indicative budget into funds that need to be outsourced and funds that the district can provide. Foot notes on the table relate to the under lying notes. Some amounts may indicate on costs for facilitation as the details needs of a project are not known at this stage, once facilitation takes place, and specific needs are identified per project, additional budgets would need to be sourced or made available.

- ① These budget allocations need to be worked in through the forthcoming IDP documents and reviews.
- ② Of this amount R 212 000 has already been allocated through the 2011/2012 IDP review document, if reviewing budgets is not an option, then funds would need to be sourced from outside funding)
- ③ Of this amount R 224 720 has already been allocated through the 2011/2012 IDP review document, if reviewing budgets is not an option, then funds would need to be sourced from outside funding)
- ④ DM can involve SAPS and offer assistance in terms of event coordination for potential awareness programmes
- ⑤ This amount is indicative on the assumption that a fully-fledged centre be built and includes operational costs. This figure however will range once the size and specifications of the centre is provided through the business and operational plan
- ⑥ Tourism system can be dealt with through making information available at information offices with regard to grading, workshops can be held to create awareness among service providers, linked to business support.

Indicative Cash Flow per Financial Year				① Yearly Budget Breakdown (DM Responsibility)						Yearly Budget Breakdown (Outsourced Funding)						Total 5 year Budget (DM + Other)
Strategic Thrust	Project/Intervention	Implementing Agent/s	Potential Funding Sources	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (DM)	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	Total (Other)	
Strategy 1.1. Improve general marketing in uThukela through varied marketing tools, information offices and adequate distribution	1.1.2 Create an Events Calendar and strategy for District and coordinate and lobby the use of local SMEs to deliver for events	uThukela DM, CTOs, service providers, LMs, LTFs	uThukela DM, DEDT	R 100 000	R 100 000	R 100 000	R 100 000	R 100 000	R 500 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 500 000.00
	1.1.4 Appoint service provider to develop a district tourism website with a data base of all attractions, and products as well as potential investments	Proposed uThukela RTO, LMs, CTOs, LTFs	uThukela DM	R 40 000	R 10 000	R 10 000	R 10 000	R 10 000	R 80 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 80 000.00
Strategy 1.2. Ensuring branding and marketing cohesion	1.2.1 Develop a district marketing and distribution strategy with a M&E system linked to tourist trends spurred by marketing initiatives , and campaigns, and seminars	uThukela DM - Proposed RTO, CTOs, LTFs, LMs, TKZN	DAC, DEDT, sponsorships from businesses,RTO	R200 000	R 500 000	R 300 000	R 300 000	R 300 00	R 1 600 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 1 600 000.00
	1.2.6 Feasibility study and Business Plan for the establishment of a detailed tourism route for uThukela	uThukela DM proposed RTO, LMs, CTOs, LTFs, TKZN	DEDT, DAC, sponsorships from businesses,RTO, Open Africa, N3 Gateway	R 350 000		0	0	0	R 350 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 350 000.00
Strategy 2.1. Develop and Grow Core tourism experiences (Nature-based and eco-tourism)	2.1.1 Provide support to the upper uThukela Stewardship process - Support the development of the upper uThukela region and community conservation areas and nature reserves to allow for eco-tourism and allied initiatives	uThukela DM, EKZNW	EKZNW, DEDT, uThukela	0	R 50 000	R 50 000	R 0	0	R 100 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 100 000.00
	2.1.4 Investigate the expansion and consolidation of Weenen Game Reserve and investigate potential as a Big Five Game Reserve	uThukela DM, EKZNW	EKZNW, uThukela, COGTA	0	R 0	R 50 000	0	0	R 50 000	R 0.00		R 1 400 000.00	R 0.00	R 0.00	R 1 400 000.00	R 1 450 000.00
	2.1.5 Provide Support the restoration of Umsuluzi Game Reserve near Colenso	uThukela DM, EKZNW	EKZNW, uThukela DM proposed uThukela RTO	0	0	R 50 000	0	0	R 50 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 50 000.00
	2.1.7 Provide support and engage linkages to Trans-Maloti Trekking Trail and MDR	uThukela DM, MDRF	uThukela DM	R 20 000	R 20 000	R 20 000	R 20 000	R 20 000	R 100 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 100 000.00
	2.1.8 Upgrade Rock Art Centres in Okhahlamba and link environmental interpretation centre	uThukela DM, Okhahlamba LM, EKZNW	TIKZN, DEDT, IDC	0	0	0	0	0	R 0	R 0.00	R 0.00	R 0.00	R 1 000 000.00	R 1 000 000.00	R 2 000 000.00	R 2 000 000.00
	2.1.12. Investigate the development of iconic natural scenic tourism experiences such as the Cableway in line with the KZN Tourism Master Plan	uThukela DM, DEDT, private stakeholders, Okhahlamba LM	DEDT	R 0	0	0	0	0	R 0	R 500 000.00	R 0.00	R 0.00	R 0.00	R 0.00	R 500 000.00	R 500 000.00
	2.2.4 Investigate potential and impact for rail tourism in light of the KZN Rail tourism Feasibility study with Ladysmith as main station	uThukela DM	DEDT, COGTA, IDC, DTI, uThukela DM	0	0	R 0	0	R 350 000	R 350 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 350 000.00
Strategy 2.2. Develop Niche Tourism Experiences (Adventure and Sport, Avi-tourism, Township and Rural Tourism, cultural and heritage tourism and community based tourism)	2.2.6 Identify and develop key existing and potential Township and Rural Tourism projects: modelled on the best case example of Mpophomeni	uThukela DM	DEDT, uThukela DM	0	0	R 350 000	0	0	R 350 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 350 000.00
	2.2.24 Create a themed heritage and cultural route along R74 (Mpofana – Weenen – Melulzi – Colenso) in according with Provincial Spatial Planning Guidelines	uThukela DM - District Tourism Entity (RTO) (destination marketing function)	COGTA, DEDT, uThukela DM	0	0	R 0	0	R 300 000	R 300 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 300 000.00
	2.2.27 Support MICE tourism by packaging investment project for a conference venue in Emmambithi/Imbabazane/Okhahlamba/Escourt	uThukela DM	TIKZN, DEDT, IDC	0	0	0	R 200 000	0	R 200 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 200 000.00
	2.2.30 Support Craft and Visual Arts exhibition in partner with Dept. of Arts and Culture	Dept. of Arts and Culture	DAC/DEDT/uThukela DM	R 120 000	R 120 000	R 120 000	R 120 000	R 120 000	R 600 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 600 000.00
	2.3.1 Facilitate the reconstruction of the Royal Natal Hotel	EKZNW, uThukela DM	uThukela DM, DEDT, EKZNW	0	0	R 10 000	R 10 000	R 10 000	R 30 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 30 000.00
Strategy 2.3. Tour Operating services, hospitality and accommodation	2.3.4 Develop a tourism information node/Hub including a district craft hub with shops and job opportunities in line with Thokozisa along N3 and N11(or main tourism routes) to include an entertainment area /centre (Aligned to Bridge To Nowhere project)	uThukela DM	uThukela, TIKZN, DAC, IDC, DEDT, COGTA	R 500 000	R 900 000	0	R 0	R 0	R 1 400 000	R 0.00	R 0.00	R 2 400 000.00	R 850 000.00	R 850 000.00	R 4 100 000.00	R 5.5.mil
Strategy 2.4. Ensure Investment promotion of tourism in uThukela	2.4.3 Develop an investment promotion strategy and incentives policy and package potential projects in collaboration with TIKZN	uThukela DM	DEDT, COGTA,uThukela	0	R 500 000	0	0	0	R 500 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 500 000.00
Strategy 2.5. Enhance safety and security in the district to support crime free tourism in uThukela	2.5.1 Engage SAPS in tourism awareness and tourist protection in uThukela DM involving all LMs ④	uThukela DM, SAPS	uThukela, LMs, SAPS	0	R 0	R 0	R 150 000	R 150 000	R 300 000	R 0.00	R 150 000.00	R 150 000.00	R 0.00	R 0.00	R 300 000.00	R 600 000.00
Strategy 2.6. Promote and Accommodate Accessible tourism	2.6.2 Development and promotion of universal accessibility tourism standards and apparatus and marketing of accessible tourism	uThukela	DTI, uThukela DM, LMs	0	0	0	R 200 000	0	R 200 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 200 000.00
Strategy 3.1. Encourage and ensure transformation of the uThukela tourism industry	3.1.1 Conduct a baseline study and transformation plan for uThukela Tourism with a M&E system	uThukela DM, LMs	DEDT, uThukela DM, COGTA	0	0	R 500 000	0	0	R 500 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 500 000.00
	3.1.2 Facilitate continuous SMME and Business Support to tourism role-players (eg. Crafters) through a development programme	uThukela DM, LMs	uThukela DM, DEDT,LMs	212000 (already in IDP budget)	224720(already in IDP budget)	R 200 000	R 200 000	R 200 000	R 600 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 600 000.00
	3.1.5 Develop a local procurement strategy linked to local SMMEs and local product owners and investigate Development and Retail of Arts and Crafts for export and through exhibitions in partnership with chain stores	uThukela DM, LMs	uThukela DM, LMs, DAC, DTI	0	0	0	R 500 000	0	R 500 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 500 000.00
Strategy 3.2. Foster a tourism culture through tourism awareness and education across the district	3.2.2 Facilitate a district tourism skills audit and development plan to guide and involve LMs	uThukela DM, LMs, CTOs, LTFs	uThukela DM, LMs	R 200 000	0	0	0	0	R 200 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 200 000.00
	3.2.3 Create a district wide strategy for tourism education and awareness programmes (career choice perception) for interested and passionate communities and school children to be rolled out per LM (See proud Schools project) in partner with an educational institution	uThukela DM, LMs, educational institutions	Dept. of Education, DEDT, uThukela DM, LMs	0	0	500 000	R 200 000	R 200 000	R 900 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 900 000.00
	3.2.4 Facilitate the establishment of a hospitality and educational centre in the district in partner with recognised tourism training centres with satellite offices ⑤	uThukela, Dept. of Higher Education, CATHSETA	Dept. of Education, DEDT, uThukela DM, LMs, National Lottery, IDC	R 500 000	0	0	0	R 0	R 500 000	R 0	R 1 000 000	R 9 000 000	R 7 000 000	R 2 500 000	R 19 500 000	R 20 000 000
	3.3.5 Develop a system of grading and standards through the Tourism Grading Council of South Africa or SATOUR and linked to CATHSETA for all accommodation, catering and other service providers including info centres to obtain baseline, provide guidelines, and ensure compliance through an annual monitoring and evaluation system of improvements (eg. tourism inspector) ⑥	Service providers, CTOs, uThukela DM, Umalusi	uThukela DM, LMs, CTO	R 50 000	R 40 000	R 40 000	R 40 000	R 40 000	R 210 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 210 000.00
Strategy 4.1. Maintain and upgrade Transport (road, air and rail) and Services infrastructure to create a conducive tourism environment	4.1.1 Facilitate and ensure continuous upgrade of R74 with Free State	Free State, uThukela DM	Dept. of Transport	0	0	0	0	0	R 0	R 2 000 000.00	R 0.00	R 0.00	R 0.00	R 0.00	R 2 000 000.00	R 2 000 000.00
Strategy 4.2. Maintain and facilitate provision of Signage to direct visitors in and around uThukela	4.1.4 Upgrade and maintain the road to Spieonkop (R181)	uThukela DM, Okhahlamba LM,Dept of Transport	uThukela DM, Okhahlamba LM,Dept of Transport	0	0	0	0	0	R 0	R 0.00	R 700 000.00	R 0.00	R 0.00	R 0.00	R 700 000.00	R 700 000.00
	4.2.6 Develop a district wide tourism and advertising signage policy, investment and communication framework to systematically guide allocation maintenance and provision of signage (inclusive of Battlefields signage).	Dept. of Transport, uThukela DM	uThukela DM, Dept. of Transport	0	0	R 600 000	0	0	R 600 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 600 000.00
Strategy 5.1. Enhance and develop tourism Research and Knowledge Management to facilitate organised and well managed tourism industry	5.1.1 Formulate a knowledge management strategy and system for collating and presenting information and visitor statistics to track demand include audit of the amount of jobs/employment figures currently occupied in all tourism related initiatives as well as revenue earned with an M/E system in place.	uThukela DM, LMs, tourism service providers	DEDT, IDC, COGTA, uThukela DM, LMs	0	R 300 000	R 0	R 0	R 0	R 300 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 300 000.00
	5.1.4 Develop a district tourism information system and database of all tourism attractions and products that is constantly updated and accessible to all stakeholders and make available on proposed website	uThukela DM, service providers, LMs, CTOs, LTFs, Battlefields Route Association, local businesses and SMMEs	uThukela DM	R 20 000	R 20 000	R 20 000	R 20 000	R 20 000	R 100 000	R 20 000.00	R 20 000.00	R 20 000.00	R 20 000.00	R 20 000.00	R 100 000.00	R 200 000.00
Strategy 5.2. Enhance tourism through institutional arrangements, collaborative partnerships, communication and policy	5.2.6 Develop a single District Tourism Entity to consist of a District Marketing Organisation / Regional Tourism Organisation and a District Tourism Forum	uThukela DM, service providers, LMs, CTOs, LTFs, Battlefields Route Association	uThukela DM, IDC, TIKZN	R 300 000	0	0	0	0	R 300 000	R 0.00	R 1 450 000.00	R 750 000	R 750 000	R 750 000	R 3 700 000.00	R 4 000 000.00
	5.2.10 Oversee that ALL local municipalities are equipped with a tourism official as per Provincial requirements	uThukela DM, LMs	uThukela DM	R 50 000	R 50 000	0	0	0	R 100 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 100 000.00
Strategy 5.3. Promotion of responsible tourism and green principles in tourism development	5.3.5 Ensure that green principles are incorporated into new tourism developments and investigate incentives for the incorporation of green principles/ link to grading and award system	uThukela DM, LMs, CTOs, LTFs, service providers	uThukela DM, CTOs	0	0	0	R 125 000	R 125 000	R 250 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 250 000.00
Strategy 5.4. Provide a sustainable Planning framework to guide and fasttrack future tourism development and investment	5.4.1. Facilitate fast tracking of planning processes (eg. Development approval processes) as well as land auditing and land availability database to enable development to occur	uThukela DM, LMs	uThukela DM	0	R 50 000	R 50 000	R 50 000	R 50 000	R 200 000	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 200 000.00
Total				②R 2 250 000	③R2 660000	R 2 970 000	R 2 245 000	R 1 695 000	R 12 320 000	R 2 520 000	R 3 320 000	R 13 720 000	R 9 620 000	R 5 120 000	R 34 300 000	R 46 620 000

Annexure 3: Provincial Spatial Planning Guideline 6: Cultural Heritage Interpretation for Spatial Planning

Provincial Spatial Planning Guideline 6

CULTURAL HERITAGE INTERPRETATION FOR SPATIAL PLANNING

July 2009



Department of
Local Government and Traditional Affairs
— KwaZulu-Natal Provincial Government —

UMnyango wezoHulumeni baseKhaya neziNdaba zaMdabu • Departement van Plaaslike Regering en Tradisionele Sake
PEOPLE-CENTRED SUSTAINABLE LOCAL GOVERNANCE WHICH FOCUSES ON EFFECTIVE SERVICE DELIVERY RESPONSIVE TO THE NEEDS OF THE COMMUNITY

Annexure 4: Previous Projects Identified by UThukela Tourism Development Plan 2007

REF NO.	PROJECT	LOCATION	IMPLEMENTING AGENT	PRIORITY	STATUS / PROGRESS	FUNDERS	POTENTIAL FUNDERS	BUDGET ALLOCATION
1	INFRASTRUCTURE DEVELOPMENT							
1.1	Regular maintenance of roads: N3 and N11	UThukela	SA ROADS AGENCY (SARA)	-	Ongoing	SARA	Nat. Dept of Transport	
1.2	Regular maintenance of roads: R74; R103; MR29; MR10; R600; and R602.	UThukela	KZN Dept. of Transport	-	Ongoing	KZN Dept. of Transport	KZN Dept. of Transport	
1.3	Upgrading and opening of the road to Spioenkop Nature Reserve (R181) to light vehicles.		KZN Dept. of Transport	-	-	-	KZN Dept. of Transport	
1.4	Improve road linkages to and in Imbabazane	Imbabazane / UThukela	KZN Dept. of Transport Local Municipality	-	-	-	KZN Dept. of Transport	
1.5	Improve road linkages to and in Indaka.	Imbabazane / UThukela	KZN Dept. of Transport Local Municipality	-	-	-	KZN Dept. of Transport	
1.6	Extend bulk electricity supply to rural areas.	UThukela	Eskom	-	Ongoing	Dept. of Minerals and Energy	Dept. of Minerals and Energy	
1.7	Extend bulk water supply to rural areas.	UThukela	UThukela DC / UThukela Water	-	Ongoing	DWAF UThukela DC	DWAF UThukela DC	
1.8	Improve signage along the N3 and main roads to entice passing road traffic into the district.	UThukela	TKZN UThukela DC	-	-	-	TKZN UThukela DC	

REF NO.	PROJECT	LOCATION	IMPLEMENTING AGENT	PRIORITY	STATUS / PROGRESS	FUNDERS	POTENTIAL FUNDERS	BUDGET ALLOCATION
2	LOCAL ECONOMIC DEVELOPMENT							
2.1	Develop a district marketing strategy, to include "branding" of the district.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	R300 000.00
2.2	Develop a tourism brochure for the district.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	R150 000.00
2.3	Development of Route Maps.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	R250 000.00
2.4	Investigate the possibilities of hosting a mini-Indaba in the district.	UThukela	UThukela DC	-	-	-	-	No funding required
2.5	Conduct a Feasibility Study of tourism initiatives in rural communities.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	R150 000.00
2.6	Initiate a guided tour programme for the Battlefields Route.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	R75 000.00
2.7	Develop an Inventory of tourism facilities in the district.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	R100 000.00
2.8	Promote the development of anchor and adventure attractions (ie; cableway, paragliding; bungee-jumping)	UThukela	UThukela DC	-	-	-	-	No funding required
2.9	Co-ordinate and promote cultural and historical tourism (ie; San; Battle Sites etc.)	UThukela	UThukela DC	-	-	-	-	No funding required

REF NO.	PROJECT	LOCATION	IMPEMENTING AGENT	PRIORITY	STATUS / PROGRESS	FUNDERS	POTENTIAL FUNDERS	BUDGET ALLOCATION
2	LOCAL ECONOMIC DEVELOPMENT							
2.10	Identify the most popular features of the district and develop a concept based on them (eg; high mountain health retreat and witchdoctor remedies).	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	R75 000.00
2.11	Extend the range of tourism attractions to cater for short-stay and day visitors, eg; guided tours, scenic routes etc	UThukela	Business	-	-	-	TKZN Business	
2.12	Grade facilities in accordance with SATOUR standards.	UThukela	TKZN	-	-	-	TKZN DACT	
2.13	Regularly hold workshops for SMME's, and invite business and industry experts to share their experiences.	UThukela	UThukela DC TKZN DACT	-	-	-	UThukela DC TKZN DACT	
2.14	Workshop significance of tourism with communities particularly rural.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	
2.15	Investigate the involvement of local communities in local income-generating activities.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	

REF NO.	PROJECT	LOCATION	IMPEMENTING AGENT	PRIORITY	STATUS / PROGRESS	FUNDERS	POTENTIAL FUNDERS	BUDGET ALLOCATION
3	SOCIAL SERVICES AND COMMUNITY DEVELOPMENT							
3.1	Hold workshops with CTO's, NGO's, and local tourism bodies in order to engage local communities.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	
3.2	Feasibility studies on community based tourism projects.	UThukela DC	UThukela DC	-	-	-	TKZN DACT UThukela DC	R75 000.00
3.3	Identification and creation of database of all historical assets in the district.	UThukela	TKZN AMAFA UThukela DC	-	-	-	TKZN DACT	R100 000.00
3.4	Develop strong relationship between the SAPS and tourism bodies.	UThukela	UThukela DC	-	-	-	-	No funding required
3.5	Feasibility study into the construction of reporting stations.	UThukela	Dept. of Public Works	-	-	-	Dept. of Public Works	R50 000.00
3.6	Market the district as a crime free tourism destination.	UThukela	TKZN UThukela DC	-	-	-	TKZN DACT UThukela DC	

REF NO.	PROJECT	LOCATION	IMPEMENTING AGENT	PRIORITY	STATUS / PROGRESS	FUNDERS	POTENTIAL FUNDERS	BUDGET ALLOCATION
4	NATURAL ENVIRONMENT							
4.1	Encourage LM's prepare their Environmental Management Plans as required to do so in the IDP.	UThukela	Local Municipalities	-	-	-	DAEA Local Municipality	R200 000.00
4.2	Start initiatives of identifying areas requiring rehabilitation and engaging local communities to run initiatives of rehabilitation.	UThukela DC	Local Municipalities	-	-	-	DAEA Local Municipality	
4.3	Dept. of Education with assistance from environmental bodies to develop programmes to educate communities on environmental protection.	UThukela	UThukela DC DAEA Dept. of Education	-	-	-	DAEA	
4.4	The LUMS processes of Okhahlamba and Imbabazane Municipalities must consider the SCAP.	Okhahlamba Imbabazane	Okhahlamba Imbabazane	-	-	DLGTA	-	R150 000.00
4.5	Protection of rock art, battlesites, and monuments.	UThukela	AMAFA UThukela DC	-	-	-	DACT AMAFA	

REF NO.	PROJECT	LOCATION	IMPEMENTING AGENT	PRIORITY	STATUS / PROGRESS	FUNDERS	POTENTIAL FUNDERS	BUDGET ALLOCATION
5	INSTITUTIONAL DEVELOPMENT							
5.1	Engage all LM's, NGO's, CTO's, and business to form uThukela Tourism Organisation.	UThukela	UThukela DC Local Municipalities	-	Ongoing	UThukela DC	UThukela DC DACT	
5.2	Develop a Communication Plan for the uThukela Tourism Organisation.	UThukela DC	UThukela DC	-	-	-	UThukela DC DACT	R150 000.00
5.3	Identify and engage all stakeholders, including potential investors in tourism development in the district.	UThukela	UThukela DC	-	-	-	UThukela DC	No funding required
5.4	Develop a Tourism Website for UThukela District.	UThukela	UThukela DC	-	-	-	TKZN DACT UThukela DC	R300 000.00
5.5	Ensure participation in TKZN marketing material for greater coverage.	UThukela	UThukela DC	-	Ongoing	TKZN	TKZN DACT UThukela DC	

Annexure 5: Passes

Northern Drakensberg - Name of Pass

Amphitheatre (Qwa-Qwa)

Namahadi Pass

Chain Ladder - E2

Mudslide

The Crack

Mnweni Reservation

Ifidi Pass

Icidi Pass

Mbundini Pass

Fangs Pass

Rwanqa Pass

Pins Pass

Manxome Pass

Mnweni Pass

Rockerries Pass

Nguza Pass

Cathedral Peak Wilderness Area

Ntonjelana Pass

Mlambonja Pass

Bell Traverse

Xeni Pass

Cockade Pass

Tseketske Pass

Organ Pipes Pass - Camel route

Thuthumi Pass

Tlanyaku Pass

Monk's Cowl/Mdedelelo Wilderness Area

Gray's Pass

Cathkin Mountain

Ship's Prow Pass

Pass	Region	Type
Namahadi Pass		
Namahadi Pass	Qwa Qwa	trail
Barricade Pass *	Qwa Qwa	trail
Chain Ladders	Qwa Qwa /RNNP	trail
Beacon Buttress Gully	Qwa Qwa /RNNP	trail
Gudu Pass	RNNP	trail(Little Berg)
Inner Tower Gully	RNNP	rock(technical)
Ifidi Pass	Mnweni	rock

Icidi Pass	Mnweni	no trail
Mbundini Pass	Mnweni	no trail
Fangs Pass	Mnweni	no trail
Rwanqa Pass	Mnweni	no trail
Pins Pass	Mnweni	rock
Manxome Pass *	Mnweni	no trail
Mnweni Pass	Mnweni	trail
Rockerries Pass	Mnweni	trail
Nguza Pass	Mnweni	rock
Ntonjelana Pass	Mnweni /Cathedral Peak	trail
Easter Pass *	Mnweni /Cathedral Peak	no trail
Mlambonja Pass (Bell Traverse)	Cathedral Peak	trail
Mlambonja Pass (Gully)	Cathedral Peak	trail
Xeni Pass	Cathedral Peak	rock
Elephant Gully	Cathedral Peak	trail(escarpment)
Cockade Pass	Cathedral Peak	rock
Tseketseke Pass	Cathedral Peak	trail
Organ Pipes Pass (Camel)	Cathedral Peak	trail
Organ Pipes Pass (Thuthumi Ridge)	Cathedral Peak	trail
Thuthumi Pass	Cathedral Peak	trail
Smuggler's Pass *	Cathedral Peak	trail
Mike's Pass	Cathedral Peak	road(Little Berg)
Tlanyaku Pass	Cathedral Peak	trail
Gray's Pass	Monk's Cowl	trail
Cowl Pass *	Monk's Cowl	no trail/ rock
Keartlands Pass	Monk's Cowl	trail(Little Berg)
Cathkin Mountain Pass	Monk's Cowl	rock
Ship's Prow Pass	Monk's Cowl	no trail
van Heyningen's Pass	Injasuthi	trail(Little Berg)
Ape's Pass *	Injasuthi	no trail
Leslie's Pass	Injasuthi	trail(technical)
Injasuthi Pass	Injasuthi	rock
Hilton Pass	Injasuthi	rock(technical)
Corner Pass	Injasuthi	rock
Judge Pass	Injasuthi	trail
Bannerman Pass	Giant's Castle	trail
Thumb Pass *	Giant's Castle	no trail
Langalibalele Pass	Giant's Castle	trail
Jarateng Pass North *	Giant's Castle	no trail
Jarateng Pass Central	Giant's Castle	no trail
Jarateng Pass South *	Giant's Castle	no trail
Giant's Castle Pass	Giant's Castle	trail
Eastern Gully	Giant's Castle	rock(technical)
Elandshoek Pass *	Giant's Castle	trail

Taylor's Pass	Giant's Castle	trail(Little Berg)
Lotheni Pass South Fork(gully access) *	Lotheni	no trail
Lotheni Pass South Fork(main access) *	Lotheni	trail
Ka Masihlenga Pass	Lotheni	no trail
Redi Pass	Lotheni	rock
Buttress Pass - The Passage	Lotheni	no trail
Hlatimba Pass North	Lotheni	no trail
Hlatimba Pass South	Lotheni	trail
Mlahlangubo Pass (Hlatimba Valley) *	Vergelegen	trail
Mlahlangubo Pass (gully)	Vergelegen	no trail
Ngaqamadolo Pass North	Vergelegen	no trail
Ngaqamadolo Pass South	Vergelegen	no trail
Dyke Pass *	Vergelegen	no trail
Mkhomazi Pass	Vergelegen	trail
Mohlesi Pass	Vergelegen	rock
Nhlangeni Pass	Vergelegen	no trail
Ka Ntuba Pass	Vergelegen	no trail
Twin Peak Pass *	Vergelegen	trail
Mangaun Pass	Vergelegen	no trail
Ntshintshini Pass	Vergelegen	no trail
Mqatesheni Pass	Vergelegen	no trail
Phinong Pass	Vergelegen	trail
Sani Pass	Cobham	road
Masubasuba Pass	Cobham	trail
Amakehla Pass (Lake's Cave) *	Cobham	trail
Amakehla Pass (Pholela Cave)	Cobham	no trail
Amakehla Pass (Ridge) *	Cobham	no trail
Minaret Pass	Cobham	no trail
Pitsaneng Pass North	Cobham	no trail
Pitsaneng Pass South	Cobham	no trail
Stones Pass North	Cobham	no trail
Stones Pass South	Cobham	no trail
Sandleni Pass *	Cobham	no trail
Uklebe Pass *	Cobham	no trail
Mzimkhulu Pass North	Garden Castle	trail
Mzimkhulu Pass Central	Garden Castle	rock
Mzimkhulu Pass South	Garden Castle	no trail
Verkyker Pass	Garden Castle	trail
Rhino Pass	Garden Castle	no trail
Mashai Pass	Garden Castle	trail
Wilson's Pass	Garden Castle	no trail
Bollard Pass *	Garden Castle	no trail
Tsepeng Pass	Garden Castle	no trail
Mzimude Pass North	Garden Castle	no trail

Mzimude Pass South	Garden Castle	no trail
Walker's Pass (Mzimude)	Garden Castle	no trail
Walker's Pass (Ridge)	Garden Castle	no trail
Isicatula Pass	Bushman's Neck	no trail(escarpment)
Saddle Neck Pass	Bushman's Neck	no trail
Ngwangwane Pass	Bushman's Neck	no trail
Thamathu Pass	Bushman's Neck	trail
Lammergeier Pass *	Bushman's Neck	no trail
Knuckles Traverse Pass *	Bushman's Neck	trail
Knuckles Pass North	Bushman's Neck	no trail
Knuckles Pass South	Bushman's Neck	no trail

Annexure 6: Craft Co-operatives and SMMEs in uThukela

No.	Name of Co-operative	Contact Person	Contact Details	Municipality
1	Vukaphansi	Florence Simelane	071 072 5356	Mnambithi
2	Sinothando Lusanda	Zanele	072 225 5592	Emnambithi
3	Mayize P. Co-op	Nonhlanhla Vilakazi	083 964 7826	UMtshezi
4	Zumukile	Nonhlanhla Mbatha	073 303 0092	Okhahlamba
5	Jamengweni Fabric Paint	Mrs Irene Mlangeni	072 632 6042	Okhahlamba
6	Ukukhanya KwaMahlubi	Delisile Nyathi	072 760 9547	Imbabazane
7	Thubokuhle	Buyile Mkhize	072 685 9844	Imbabazane
8	Luleka Co-operative	Sister Nduli	082 720 8720	Indaka
9	Mandlakazi	Thoko Mabaso	074 660 4252	
10	Sinothando	Mbuyiseni Thusi/Nikeziwe Mkhize	076 035 3629/072 964 8793	Umtshezi
11	Kuyasa	Christine Mswane	073 147 7515	Indaka
12	Sinothetha	Thokozile Msibi	073 396 0893	Umtshezi
13	Bambisanani Arts & Craft	Zimile Khumalo	082 665 9117	Umtshezi
14	Sinothando lusanda	Zanele Hlongwane	072 335 5592	Mnambithi
15	Ingwe emabala	Hlengiwe Mntambo	072 643 3936	Indaka
16	Eyethu Arts & Craft	Ntombifuthi Mtshali	082 519 8512	Mnambithi
17	Thembusongile	Sibongile Sithole	079 163 5045	Umtshezi
18	St Chad's Arts & Craft	May Ndlovu Vumile Cebekhulu	036 631 8657 084 408 6127	Mnambithi
19	Isidleke Arts & Craft	George Dube Collen Dube	073 338 9472 073 995 8335	Mnambithi
20	Mama Bokuthula Arts & Craft	Mandlela Khanyeza	073 469 6123	Mnambithi
21	Sindisiwe Arts and Craft	Mandlela Khanyeza	073 469 6123	Mnambithi
22	Vusisizwe Arts & Craft	Lungile Nxumalo	082 082 6355	Mnambithi
23	Lawawo Arts & Craft	Mrs Lingeni Mzinyane	079 720 4345	Mnambithi
24	Isiphephelo Arts & Craft	Mrs Victoria Nhlabathi	073 681 4722	Mnambithi
25	Masibambane Arts & Culture	R Nhlanhla Thabede	078 776 0016	Mnambithi
26	Icomu Arts and Craft	T P Kubheka	073 799 8741	Mnambithi
27	Vukaphansi	Virginia Ngubo	078 408 2318	Mnambithi
28	Ifikile culture	Mr Mthabela Celiwe(game reserve skins)	072 521 8382 0734694039	Indaka
29	Amazizi Co-operative	Beauty Mbongwa	078 2606257	Okhahlamba
30		Nelisiwe Khanyile	076 9270121	Indaka
31	Mpilonhle Project	Nomantshali Mtshali	0731578775	Emnambithi
32	Phakamani Dabe	Sibongile Mazibuko Mrs Mhlanga	0718351641 072 118 4611	Imbabazane
33	Impumelelo Arts & Craft	Lillian Thwala	073 3843 436	Emnambithi
34		Nana Ndlovu / Aura Shabalala	073 6572 564	Emnambithi
35	Thembalihle Luncheon Club	Sebenzani Mabaso Nana Kubheka	079 286 4986 076 505 1252	Emnambithi
36	Siphuxolo Craft Co-operative	Ntombi Sithole	072 519 4536	Indaka
37	Eyethu Ceramic Art	Vusi Ntshalintshali	073 382 7162	Okhahlamba
38	Emhlwazini/ Impumelelo	Mrs Ndlovu		Okhahlamba

No.	Name of Co-operative	Contact Person	Contact Details	Municipality
	Craft Co-operative			
39	Siyawela St Joseph Women's Club	Mrs Ngwenya	072 512 0210	Emnambithi
40	Sisonke Crafters	Sandile Dlamini	073 765 731	Emnambithi
41	Silethokuhle Training Enterprise	Noma Mtshali (mpilonhle@webafrica.org.za)	0731578775	Emnambithi
42	Gcinimpilo Arts & Craft	Buyisile Ngcobo	083 496 9138	Emnambithi
43	Jabula Club	Thuli Mtshali	N/A	Emnambithi
44	Zisizeni Group	Mrs Ndlela	078 521 5231	Imbabazane
45	Ubuhlebemvelo Co-operation	Doris Mbatha	072 658 9368	Imbabazane
46	Simunye Co-operative	Thabisile Nxumalo Nontsikelelo Njoko	083 892 6475 076 446 8953	Imbabazane
47	Nothetho Crafters	Nomkhosi Duma	076 929 1483	Imbabazane
48	Mandlakazi Co-operative	Margaret Ndlovu		Imbabazane
49	Langalibalele Co-operation	Nikiwe Sithole	072 819 5683	Imbabazane
50	Impumelelo Craft Centre	Mbongeni Mdluli	083 487 1670	Okhahlamba
51	Sizolwaphezulu	Thuli Ngwenya	083 238 2563	Indaka
52	Siyazenzela	Mr Vilakazi	076 168 5698	Indaka
53	Impangele cc	Gugu Michael Shabalala	076 408 8792	Umtshezi
54	Ithuba Lokwenza Co-operation	Dolly	084 826 9800	Umtshezi

SMMEs			
ESTABLISHMENT NAME	CONTACT PERSON	CONTACT NUMBER	EMAIL ADDRESS
TUGELA FALLS B&B	YODWA	0823157759	
MNWENI CULTURAL CENTRE	AGRIPPA	0727122401	
KWAMNTUNGWA B&B	ZA	0828271222	
KWAHLANGABEZA CULTURAL HUB	NCEDILE	0832867476	KwaHlangabez@mweb.co.za
MAWANDI GUESTHOUSE	ZAMA	036 6377412 0768844868	stay@mawandiguesthouse.co.za

Annexure 7: Response from Crafters

What do they Sell?	KwaZamokuhle Diaconic: Beadwork, Grass Baskets, Church vestments, baking and communion wafers	Langalibalele: Beadwork, woodwork traditional attires and t-shirts	Mnweni: Hiking, Rock art, Horse riding, take tourists to home steads, there is also a marathon that takes place every year called Mnweni marathon it has been running for the past 3years. They sell for crafters in the community as well
Target Market	Churches	Members of the community, and tourists but it is hard for them to get any tourists since they don't have signage	Tourists and locals(SA), scholars as well
Best Selling item	Communion Wafers	Traditional attires, grass made table mats	Hiking is the most demanded service
Location	Ephangweni, Loskop road Imbabazane	Giants castle Road, Imbabazane	Bergville
Who Supplies Them?	They are their own suppliers	They are their own Suppliers	For hiking, Chameleon Adventure Academy based in Pretoria, then for the rest of their products and services they supply themselves
Do they offer any Training?	They do train new staff	No, they only take people who are already good at what they do.	They train guides especially for hiking
Do they exhibit at any events? If yes, which ones?	They have gone to the royal show in PMB	Yes, White Mountain festival, Royal show, Gateway Mall	No
Are they Publicly or Privately owned?	They are a church institution	They are a co-operative, they have been receiving help from CEDA for their Marketing strategy.	They are a community Centre
What do they Sell?	St Chads Arts and Crafts: Zulu traditional attire	African loom: Raw cotton Bags, Cushions and Rugs	Omama Benhlonipho: Beadwork, and the Zulu Attires
Target Market	Local Community members only, they haven't been able to attract any tourist	Mainly tourists, the owner believes that the local community members cannot afford their products since they are very expensive.	Only local Community Members
Best Selling Item	They don't have any bestselling items	Bags	Necklaces
Location	Zakheni, Ladysmith	Admore Farm,	Ladysmith
Who supplies them?	They are their own suppliers	They buy raw cotton and process it themselves and make their products	They are their own Suppliers

Do they Offer any training?	No	They train staff	They train each other
Do they exhibit at any events? If yes, which ones?	No	No, their problem is financing	The Municipality calls them from time to time to give them a stand
Are they Publicly or Privately owned?	They are privately owned	They are privately owned	They are privately owned
What do they Sell?	Umshosha Arts and Craft: Traditional Attire and they do photography as well	Tactile Carpets: Wool Carpets	Eyethu Arts and Craft: Traditional attire beadwork, they also rent their attire.
Target Market?	Local community members and tourists	Local Community Members, they don't sell to tourists since they are a small flexi business. They are not Marketed well as a result their business is not going well at all	Local community members and tourists
Best Selling Items?	Zulu shields and traditional attire	The Carpets are not selling well	Traditional attire but now it falls under textiles, it isn't recognised as crafts anymore. After last year their business started going slow, this maybe because the municipality stopped putting emphasis on helping crafters around the area develop.
Location	Okhahlamba area, eDukuza	Ladysmith area	Ezakheni Ladysmith
Who supplies Them?	They supply themselves	They have just lost a wool supplier, the owner didn't disclose any names and she mentioned that they are currently struggling with finding other ones.	They are their own suppliers
Do they offer any sort of training?	They do train their staff	They do train their staff. The staff is made out of 3 women who live in their farm	Arts and Culture takes few of their members to train other groups.
Do they exhibit at any events? If yes, which ones?	They have done exhibitions at the Ladysmith Youth Centre when they host festivals	They have not gone to any exhibitions due to lack of finding.	They have been selected by the DED to go exhibit at Gateway and at the Royal Show but they haven't gone since 2009. They were told that since there is a large number of crafters around the area they will have to take turns but there are other groups who have gone multiple times in a row without having to take turns with others. The owner says there is some corruption that goes on concerning the selections

Are they privately or publicly owned?	They are privately owned and they are registered	They are a private company.	They are privately owned. They are registered as a co-op. In terms of space to sell their products the owner said they only sell at flea markets or if the municipality gets them a table to sell in town.
Further Comments		The owner is very unhappy about the municipality. She says they do not deliver at all in the rural areas. She gets very bitter when you mention asking for help to them.	The local municipality is very slow when it comes to assisting them. It is only this year that they have been recognised as crafters, they were paid to come exhibit at the Battlefield festival and during September as it is the Heritage month. As it comes to the District municipality they have not received any help from them. The owner feels that only those crafters that are near uKhahlamba are getting much attention from the District municipality but those that are in Ladysmith, Indaka and Imbabazane are not receiving any support.
What do they sell?	Gcwensa Cultural Village: Beadwork, traditional attires, they educate people about the Zulu Culture and history.	Madadeni Self-help Community development project: Beadwork, traditional attires and wedding gowns	Masizithuthukise Multicultural Art and Craft: They are still mainly service providers they go to schools and train teachers on Arts and craft. They would like to go full-on to business and sell their crafting but they have been struggling since 2005 to find a place to conduct their daily business operations. They have contacted the municipality and the department of Public works but haven't got any response.
Target Market	Tourists (mainly overseas)	The community and tourists	
Best selling items	Beadwork and traditional attires	Beadwork	
Location	Blaaubosch Farm near Osizweni in Newcastle	Emzamo shopping centre near Osizweni in Newcastle	

Who supplies them?	With the beadwork and traditional attires they supply it themselves. With the tourists coming to the village, they Carnegie Art Gallery are the supplier of the tourists.	They supply themselves	
Do they offer any sort of training?	They do train the people on how to make traditional attires, they train anybody who is interested and they don't ask any sort of payment from them	They are currently 14 members and they train each other. They welcome any member of the community who is interested to come and gain skills. If they come as individuals they are charged a certain amount, if they come as groups they receive the training for free.	
Do they exhibit at any events? If yes, which ones	Since they usually have a lot of tourist that visit the village they allow the crafters around Newcastle to come exhibit their work at the village.	They have exhibited in Pretoria, at Gateway in Durban for the 2010 world cup, they have represented Newcastle at the Winter Festival and they exhibited there.	They have been called to exhibit their work at the Majuba Winter Festival and they were also invited to exhibit at the Tourism Indaba in Durban but due to lack of finances they could not go.
Are they privately/Publicly owned?	They are privately owned but receives a lot of support from the municipality	They are privately owned and they are registered	
Further Comments	They have a really good relationship with the municipality. The municipality has recently taken over the place they used to rent and renovate it and take put it under municipal control.	They have a good relationship with the municipality but feel that communication between them can be improved. The municipality build them an RDP house for them to use to sell their work.	

Annexure 8: 151 Recorded Accommodation

Attraction Name	Attraction Type	Attraction Activity/Activities/Description (eg. Accommodation, nature reserve, game reserve, children's activities, crafting, nature and wildlife viewing, professional hunting, fishing, walking trail, 4x4 trail, golf, adventure activities)	District Municipality	Local Municipality
Anthony B&B	Accommodation		UThukela	Bergville
Berg House Cottage	Accommodation		UThukela	Bergville
Bergville Caravan Park	Camping	Caravanning, camping	UThukela	Bergville
Caterpillar and Catfish Cookhouse	Accommodation and Restaurant		UThukela	Bergville
Sungubalabush camp	Camping	Caravanning, camping	UThukela	Bergville
The Berghouse and Cottages	Accommodation		UThukela	Bergville
Tozer's B&B	Accommodation		UThukela	Bergville
Tugela Falls B&B	Accommodation		UThukela	Bergville
Tugela Rapids	Bush Camp	Camping and Game viewing	UThukela	Bergville
Beechwood Place	Accommodation		UThukela	Central Drakensberg
Shiriba Farm	Accommodation	Golf course	UThukela	Central Drakensberg
Cromely Bank Bush Camp	Accommodation		UThukela	Colenso
Cromley Bank Bush Camp	Accommodation	Caravanning, camping	UThukela	Colenso
The Aloes Game Farm	Accommodation and Game farm		UThukela	Colenso
Aloe B&B	Accommodation		UThukela	Drakensberg
Ama Casa Cottages and Nursery	Accommodation		UThukela	Drakensberg
Berghaven Cottages	Accommodation	Nature viewing	UThukela	Drakensberg
Buhlebemvelo	B&B, Restaurant and bar	Traditional and cultural experience	UThukela	Drakensberg
Bushman's Nek	Accommodation & spa	spa treatment, golf, hiking, fishing	UThukela	Drakensberg
Castleburn	Accommodation	Hiking, Restaurants, fly fishing	UThukela	Drakensberg

Attraction Name	Attraction Type	Attraction Activity/Activities/Description (eg. Accommodation, nature reserve, game reserve, children's activities, crafting, nature and wildlife viewing, professional hunting, fishing, walking trail, 4x4 trail, golf, adventure activities)	District Municipality	Local Municipality
Caterpillar and Catfish Cookhouse	Accommodation		UThukela	Drakensberg
Cathedral Peak Hotel	Accommodation	hikes, horse and pony rides, cold and heated swimming pools,	UThukela	Drakensberg
Cathkin Cottage	Accommodation	Nature viewing	UThukela	Drakensberg
Champagne View Estate	Accommodation	Golf, Hiking, Mountain biking, birding, helicopter flips	UThukela	Drakensberg
Didima Camp	Accommodation	Nature and wildlife viewing	UThukela	Drakensberg
Drakensberg Gardens, Golf and Spa	Accommodation	Golf	UThukela	Drakensberg
Drakensberg inn	Accommodation		UThukela	Drakensberg
Drakensberg Sun Hotel and Resort	Accommodation		UThukela	Drakensberg
Drakensville Holiday Resort	Holiday Resort	Nature and Cultural viewing	UThukela	Drakensberg
Easby Historic House B&B	Accommodation	Nature viewing	UThukela	Drakensberg
Elmwood B&B	Accommodation		UThukela	Drakensberg
Emaweni Cottages	Accommodation		uThukela	Drakensberg
Emaweni game ranch and Hunting Lodge	Accommodation and nature reserve	Hunting, nature viewing	UThukela	Drakensberg
Ezulwini Berg Resort	Accommodation	Nature and wildlife viewing	UThukela	Drakensberg
Highthorn Farm	Accommodation	Trout; fishing, hiking, bird watching, golf course, mountain biking	UThukela	Drakensberg
Ikhayalamafu	Accommodation		UThukela	Drakensberg
Injisuti's Camp	Accommodation	Caravanning, camping	UThukela	Drakensberg
Inkosana Lodge and backpackers	Accommodation		UThukela	Drakensberg
Isifundo Cottage	Accommodation	Nature and Cultural viewing	UThukela	Drakensberg
Jabulani Bush Camp	Accommodation	Caravanning, camping	UThukela	Drakensberg
Liandaff Lodge	Accommodation		UThukela	Drakensberg
Little Switzerland Resort	Accommodation		UThukela	Drakensberg

Attraction Name	Attraction Type	Attraction Activity/Activities/Description (eg. Accommodation, nature reserve, game reserve, children's activities, crafting, nature and wildlife viewing, professional hunting, fishing, walking trail, 4x4 trail, golf, adventure activities)	District Municipality	Local Municipality
Marmalade Cottage	Accommodation	Battlefields, golf course	UThukela	Drakensberg
Mike's Cottage	Accommodation		UThukela	Drakensberg
Montusi Mountain Lodge	Accommodation	Cultural and Nature viewing	UThukela	Drakensberg
Mountain Splendour	Accommodation	Caravanning, camping	UThukela	Drakensberg
Orion Mont Aux Sources	Accommodation	Nature viewing	UThukela	Drakensberg
Sagarmatha	Accommodation	Monks cowl adventure, Ushaka horse trail, hiking, mountain biking	UThukela	Drakensberg
Sandford Park country hotel	Accommodation		UThukela	Drakensberg
Scrumpy Jacks & Khotso Horse Trails	Accommodation		UThukela	Drakensberg
Spioenkop Lodge	Accommodation	Battlefield tours, Sunset boat cruising, horse riding	UThukela	Drakensberg
The Homestead	Accommodation		UThukela	Drakensberg
The Ledges Guest Farm	Accommodation	Nature and wildlife viewing	UThukela	Drakensberg
Thekwane's Nest/the shed	Accommodation		UThukela	Drakensberg
Thendele	Accommodation	Nature and wildlife viewing	UThukela	Drakensberg
Three trees	Accommodation	Walking trails, hiking, accommodation, nature and cultural viewing, horse riding, birding, golf, game drives, hiking	UThukela	Drakensberg
Treks Trips and Trails	Accommodation		UThukela	Drakensberg
Willow grange Country Hotel	Accommodation	none	UThukela	Drakensberg
Wits End	Accommodation	Nature and Wildlife viewing, fishing, canoeing, birding	UThukela	Drakensberg
Blue Haze Country Lodge	Accommodation	Horse trails, boat cruises, river rafting	UThukela	Escourt
White Mountain conference and team building Resort	Accommodation	Caravanning, camping	UThukela	Escourt
Oak Cottage	accommodation-Self Catering		UThukela	Escourt
Hillside Chalets	Accommodation		UThukela	Estcourt

Attraction Name	Attraction Type	Attraction Activity/Activities/Description (eg. Accommodation, nature reserve, game reserve, children's activities, crafting, nature and wildlife viewing, professional hunting, fishing, walking trail, 4x4 trail, golf, adventure activities)	District Municipality	Local Municipality
Ashtonville Terraces Guest House	Accommodation		UThukela	Estcourt
At Home B&B	Accommodation		UThukela	Estcourt
Bass waters Guest Farm	Accommodation		UThukela	Estcourt
Glenroy Guest House	Accommodation		UThukela	Estcourt
Leopards Lair	Accommodation		UThukela	Estcourt
Monte Vista	Accommodation		UThukela	Estcourt
Monte vista Guest House	Accommodation		UThukela	Estcourt
Sewula Gorge Lounge	Accommodation		UThukela	Estcourt
Slievre Game Farm	Nature Reserve and Accommodation	Camping and Game viewing	UThukela	Estcourt
Summer Place Backpackers Lodge	Accommodation		UThukela	Estcourt
The River house	Accommodation		UThukela	Estcourt
Thyme and Again	Accommodation		UThukela	Estcourt
Alpine Health Resort and Conference	Accommodation		UThukela	Ladysmith
Augustine Avenue B&B	Accommodation	Luxury accommodation	UThukela	Ladysmith
Balbrogie Guest Farm	Accommodation		UThukela	Ladysmith
Bella's rest	Accommodation	Braai facilities	UThukela	Ladysmith
Boer and Brit B&B	Accommodation		UThukela	Ladysmith
Bokmakierrie Country Lodge	Accommodation		UThukela	Ladysmith
Bonnie Highlands	Accommodation		UThukela	Ladysmith
Budleigh House	Accommodation	Cultural and Nature viewing	UThukela	Ladysmith
Buller's Rest Lodge	Accommodation	Heritage accommodation	UThukela	Ladysmith
Cobblers Cove B&B	Accommodation		UThukela	Ladysmith

Attraction Name	Attraction Type	Attraction Activity/Activities/Description (eg. Accommodation, nature reserve, game reserve, children's activities, crafting, nature and wildlife viewing, professional hunting, fishing, walking trail, 4x4 trail, golf, adventure activities)	District Municipality	Local Municipality
Crown Hotel and Conference Centre	Accommodation		UThukela	Ladysmith
Durnford's Lodge	Accommodation	Luxury accommodation	UThukela	Ladysmith
Egerton Manor	Accommodation		UThukela	Ladysmith
Elephant Rock Game Lodge and Springbok lodge	Accommodation	Game farming, nature viewing	UThukela	Ladysmith
Ergeton Manor Guest House	Accommodation	Luxury accommodation	UThukela	Ladysmith
Farquhar Lodge	Accommodation		UThukela	Ladysmith
Green Lanten Inn	Accommodation		UThukela	Ladysmith
Hoffman House	Accommodation		UThukela	Ladysmith
Hotel Natalasia	Accommodation		UThukela	Ladysmith
Hunters Lodge	Accommodation	Battlefield tours	UThukela	Ladysmith
Hunter's Lodge	Accommodation		UThukela	Ladysmith
Ladysmith Motel	Accommodation		UThukela	Ladysmith
Lavender Lane B&B	Accommodation	Luxury accommodation	UThukela	Ladysmith
Mac's Nest B&B	Accommodation		UThukela	Ladysmith
Malibu Palms B&B	Accommodation		UThukela	Ladysmith
Mawelawela B&B	Accommodation		UThukela	Ladysmith
Nambiti Private Game Lodge	Accommodation	Game Drives	UThukela	Ladysmith
Oyengweni Guest House	Accommodation	bar and braai facilities	UThukela	Ladysmith
Peaches & Cream	Accommodation		UThukela	Ladysmith
Phumula Safari Lodge	Accommodation	Birding, Gaming, Walking trails	UThukela	Ladysmith
Platrand and burger memorial and Lodge	Heritage site(Accommodation)	Traditional and cultural experience	UThukela	Ladysmith

Attraction Name	Attraction Type	Attraction Activity/Activities/Description (eg. Accommodation, nature reserve, game reserve, children's activities, crafting, nature and wildlife viewing, professional hunting, fishing, walking trail, 4x4 trail, golf, adventure activities)	District Municipality	Local Municipality
Rietkuil Country Cottages	Accommodation		UThukela	Ladysmith
Shalom B&B	Accommodation		UThukela	Ladysmith
Thatcher's Country Guest House	Accommodation		UThukela	Ladysmith
Thorold's Treasure Retrieve	Heritage accommodation		UThukela	Ladysmith
Trenchgula Guest Lodge	Accommodation	Game Viewing	UThukela	Ladysmith
Tugela Game Ranch Bush camp	Camping	Caravanning, camping	UThukela	Ladysmith
Tuskers Guest House	Accommodation		UThukela	Ladysmith
Ukuthula Bush Camp and horse trails	Accommodation	Caravanning, camping	UThukela	Ladysmith
Umzozolozolo Lodge	Accommodation	Game Drives	UThukela	Ladysmith
Witsieshoek Mountain Lodge	Accommodation		UThukela	Ladysmith
Woodlands and Long grass Lodges	Big 5 and Battlefield Lodge		UThukela	Ladysmith
Amphitheatre Backpackers	Accommodation	Hiking trails, Horse riding, Mountain biking, Touring Historical sites, game viewing, Fishing, rock climbing	UThukela	Northern Drakensberg
Bingelesa contemporary classic	Accommodation, restaurant and Pezzeria		UThukela	Northern Drakensberg
Erin Cottage	Accommodation		UThukela	Northern Drakensberg
Gina's self-catering Chalets	Accommodation	Hiking, quad biking, 4x4 trails	UThukela	Northern Drakensberg
The Green Lantern Inn	Accommodation		UThukela	Van Reenen
Boer Bean B&B	Accommodation		UThukela	Weenen
Darkest Africa	Accommodation		UThukela	Weenen
Imbabala Lodge	Accommodation		UThukela	Weenen
Owl and Elephant Lodge	Accommodation		UThukela	Weenen

Attraction Name	Attraction Type	Attraction Activity/Activities/Description (eg. Accommodation, nature reserve, game reserve, children's activities, crafting, nature and wildlife viewing, professional hunting, fishing, walking trail, 4x4 trail, golf, adventure activities)	District Municipality	Local Municipality
Admore Guest Farm	Accommodation	Mountain hiking	UThukela	Winterton
Aller Park accommodation	Accommodation		UThukela	Winterton
Bellpark B&B Self-catering	Accommodation		UThukela	Winterton
Cayley Lodge	Accommodation		UThukela	Winterton
Champagne Lane Resort	Accommodation		Uthukela	Winterton
Clivia hill guest house	Accommodation		UThukela	Winterton
Dragon Peaks	Mountain Resort	Mountain Boarding, Horse riding, walking trails	UThukela	Winterton
Erskine cottages	Accommodation		UThukela	Winterton
Hill Billy cottage	Accommodation		UThukela	Winterton
Lilac Lodge / Purple House	Accommodation		UThukela	Winterton
Misty Peaks Villa	Accommodation		UThukela	Winterton
PalmswiftB&B	Accommodation		UThukela	Winterton
Peak View Cottage	Accommodation		UThukela	Winterton
River Crossing B&B and Self-catering	Accommodation		UThukela	Winterton
Rose Cottage B&B	Accommodation		UThukela	Winterton
Tammy-Janes Berg Living	Accommodation		UThukela	Winterton
The Bridge Hotel	Accommodation		UThukela	Winterton
The Nest Drakensberg Mountain Resort	Accommodation and Holiday Resort	Hiking	UThukela	Winterton
The Swallow's Nest	Accommodation		uThukela	Winterton
Tugela River Lodge and Hide away	Accommodation		UThukela	Winterton
Ukhozi Bush Lodge	Accommodation		UThukela	Winterton
Battlefields Backpackers	Accommodation	Battlefield Tours	UThukela	

Attraction Name	Attraction Type	Attraction Activity/Activities/Description (eg. Accommodation, nature reserve, game reserve, children's activities, crafting, nature and wildlife viewing, professional hunting, fishing, walking trail, 4x4 trail, golf, adventure activities)	District Municipality	Local Municipality
international				
Boardman Heights B&B	Accommodation		UThukela	
Clarendon B&B	Accommodation		UThukela	
Naunton Luxury Accommodation	Accommodation		UThukela	

Annexure 9: Events Calendar for Emnambithi LM

FEBRUARY 2012				
Date	Name of Event	Contact Person	Contact Numbers	Email Address
28 February 2012	Free Passport to Museums	Thobeka Nkosi/ Ria Sanker	Siege Museum Tel: 036 6372992	tourism@ladysmith.co.za
MAY 2012				
Date	Name of Event	Contact Person	Contact Numbers	Email Address
05-12 May 2011	3 rd Annual Battlefields Festival • Military Parade • Multicultural Exhibition & Traditional Cuisine • Umbulwane Gun Run Competition • Arts & Craft Fair	Rosheila Thomas or Luke Makhubo	Siege Museum Tel: 036 6372992 Cell: 083 6337462 Cell: 0722363200	rthomas@ladysmith.co.za ismakhubo@ladysmith.co.za
14 – 18 May 2012	Museum Awareness Week (Museum Day Celebration)	Luke Makhubo	Siege Museum 036 637 2992	ismakhubo@ladysmith.co.za
25 May 2012	Oral History Workshop	Jongu Shabalala	Siege Museum Tel: 036 6372992 Cell: 0736188163	jshabalala@ladysmith.co.za
JUNE 2012				
Date	Name of Event	Contact Person	Contact Numbers	Email Address
01 June 2012	Fine Arts Exhibition Evening & Poetry Session	Zanele Ntshingela	Emnambithi Cultural Centre Tel: 036 6354231 Cell: 0827010444	culturalcentre@ladysmith.co.za
AUGUST 2012				
Date	Name of Event	Contact Person	Contact Numbers	Email Address
22 August 2012	Tourism Development Workshop	Zanele Ntshingela	Emnambithi Cultural Centre Tel: 036 6354231 Cell: 0827010444	culturalcentre@ladysmith.co.za
SEPTEMBER 2012				
Date	Name of Event	Contact Person	Contact Numbers	Email Address
01 September 2012	Satellite Heritage Event	Luke Makhubo	Siege Museum Tel: 036 6372992 Cell: 0722363200	ismakhubo@ladysmith.co.za

08 September 2012	Satellite Heritage Event	Luke Makhubo	Siege Museum Tel: 036 6372992 Cell: 0722363200	ismakhubo@ladysmith.co.za
15 September 2012	Satellite Heritage Event	Luke Makhubo	Siege Museum Tel: 036 6372992 Cell: 0722363200	ismakhubo@ladysmith.co.za
22 September 2011	<ul style="list-style-type: none"> Concert in the park Arts & Craft Fair Cultural Performance 	Zanele Ntshingela	Emnambithi Cultural Centre Tel: 036 6354231 Cell: 0827010444	culturalcentre@ladysmith.co.za
24 September 2011	<ul style="list-style-type: none"> Indigenous Music festival Isicathamiya Competition Indigenous Games Heritage Fashion Fair Arts and Craft fair 	Jongu Shabalala & Zanele Ntshingela	Siege Museum Tel: 036 6372992 Cell: 0736188163 & Emnambithi Cultural Centre Tel: 036 6354231 Cell: 0827010444	jshabalala@ladysmith.co.za & culturalcentre@ladysmith.co.za
OCTOBER 2012				
Date	Name of Event	Contact Person	Contact Numbers	Email Address
10 October 2012	Tourism and Hospitality Skills Workshop	Zanele Ntshingela	Emnambithi Cultural Centre Tel: 036 6354231 Cell: 0827010444	culturalcentre@ladysmith.co.za
NOVEMBER 2012				
Date	Name of Event	Contact Person	Contact Numbers	Email Address
02 November 2012	Free Passport to Museums	Thobeka Nkosi	Siege Museum Tel: 036 6372992	tourism@ladysmith.co.za
11 November 2012	Amnesty Day	Contact Person	Contact Numbers	Email Address
		Thobeka Nkosi	Siege Museum Tel: 036 6372992	tourism@ladysmith.co.za
DECEMBER 2012				
Date	Name of Event	Contact Person	Contact Numbers	Email Address
06 December 2012	Christmas Crackers	Jongu Shabalala	Siege Museum Tel: 036 6372992 Cell: 0736188163	jshabalala@ladysmith.co.za
07 December 2011	Christmas Tea for the Old aged homes	Thobeka Nkosi	Siege Museum Tel: 036 6372992	tourism@ladysmith.co.za

			Cell: 0736188163	
19 December 2012	Christmas Carol	Rosheila Thomas	Siege Museum Tel: 036 6372992 Cell: 0836337462	rthomas@ladysmith.co.za