TOURISM KWAZULU-NATAL STRATEGIC PLAN 2014-2019
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1. **EXECUTIVE SUMMARY**

The KwaZulu-Natal Tourism Authority, trading as Tourism KwaZulu-Natal (TKZN), was established in terms of the KwaZulu-Natal Tourism Act, 1996, as amended by Act No. 2 of 2002. In terms of the aforementioned Act, TKZN is responsible directly and indirectly for the development, promotion and marketing of tourism into and within the province.

TKZN developed and implemented its strategic plan for the period 2008 –2012. Highlights of this period were:

- South Africa’s very successful hosting of the FIFA Soccer World Cup in 2010;
- The development of the National Tourism Sector Strategy in 2011;
- In 2012 the KwaZulu-Natal (KZN) Provincial Government adopted a new Provincial Growth and Development Strategy and an accompanying Provincial Growth and Development Plan, which was aligned to the National Development Plan adopted by national government; and
- Also relevant was the finalisation during 2012 of the KwaZulu-Natal Tourism Master Plan which set out the key goals for the tourism sector in KZN up to 2030.

All of these have great significance for the role, objectives, targets and *modus operandi* of TKZN in the 2014-2019 period, and have been the key reference points in the drafting of the new organisational strategic plan. The strategic plan comes into effective for period commencing 01 April 2014.

The Provincial Growth and Development Plan points to tourism as one of the key drivers of economic development for the country and our province as well as a priority sector for job creation. TKZN’s strategic plan thus places job creation at the centre of its set of objectives. Going forward, all aspects of TKZN’s work will be assessed against the criterion of how significant that work is in terms of stimulating sustainable job creation. This principle stands out most significantly in the two core-business areas of TKZN, namely marketing, and tourism development. For this strategic plan, this means:

1) In marketing KZN as a premier tourist destination, TKZN will focus its energies on and leverage resources to grow tourist arrivals from those markets which show the greatest potential for significant growth in the years ahead. The strategy therefore allows for TKZN to give greater focus in future to:

- The growing urban middle class in the hinterland of the country, who are “new tourists”, and whose entry into this new lifestyle of taking tours to KZN needs to be facilitated; and
- The growing tourist market from the external markets of the southern African neighbouring countries, as well as from the major emerging markets of Brazil, Russia, China, and India (BRIC). With South Africa forming part of the international BRICS economic block, major new opportunities for tourism are expected to grow.
- An important opportunity also exists to grow the association and government meetings markets for Durban and KwaZulu-Natal. This can be achieved by aggressively engaging with associations in South Africa and relevant representatives of government departments both at a provincial and national basis. International associations will be engaged at the key international trade shows that the Durban KwaZulu-Natal Convention Bureau attends.
• The incentive market is another key business events market that the National Convention Bureau of South Africa has decided to engage. KwaZulu-Natal has a range of new up-market experiences that can easily be weaved into incentive offerings. It is important that the Durban KwaZulu-Natal Convention Bureau builds relationships with all of South Africa’s organisers through the South African Chapter of the Society of Incentive Travel Executives and engages incentives at the key business event trade shows that it attends.

2) In supporting the development of KZN’s tourism product offering, TKZN will have to be a lot more aggressive in championing the development of new products which allow for higher tourist volumes, e.g. from international charter markets, to complete the product offerings. Key amongst these will be:

• The development of new, large-scale beach resorts which appropriately respond to the demand from international tour operators for this in close proximity to the wildlife experience products which already exist in KZN; and
• The development of heritage tourism projects which are able to fulfil the demand for appropriate accommodation and travel products which are integrated with the heritage tourism offerings in KZN.
• The development of a transport infrastructure making the rest of the province more accessible and affordable for conference delegates and organisers

Critically, this strategic plan embraces the principle that “transformation” of the tourism sector must be integrated into all its activities. Transformation, in this sense, means that the goal is that KZN’s tourism sector should better reflect the demographics of the country, and of this province, especially as regards the ownership and management of the tourism businesses which operate in KZN, but also in terms of the tourism consumer market. Thus in TKZN’s future marketing campaigns, as well as in the product development strategies, it will seek to facilitate and strengthen the access of the previously disadvantaged to operate successfully in the tourism sector. This will be done with specific attention to skills development and to the development of a much stronger culture of service quality generally.

Public Relations and Communications, as a functional business area of the organisation, is being re-positioned to be more fully integrated with the other two core business areas of Marketing and Tourism Development. More than anything else TKZN is a voice to build and market tourism in KZN, and hence it is essential that the plans for Public Relations and Communications target the right messages for the right audiences as determined by the marketing and tourism development strategies. In addition, it must be acknowledged that TKZN cannot and should not try to implement the new 2012 KZN Tourism Master Plan single-handedly. The successful building and the transformation of the tourism sector requires many other stakeholders, many of whom will have to invest much more than TKZN in order for the successful achievement of the tourism goals in the next 5 years. TKZN, especially through the office of the CEO, will need to build new industry-wide partnerships focused on the goals of the Tourism Master Plan. This strategic plan highlights the importance of building much stronger action-oriented partnerships with the trade, so that there is no element of duplication or wastage that occurs in the investment and marketing initiatives of TKZN and the tourism businesses operating or doing business with the tourism sector in KZN.

The Tourism Information Services division provides a variety of platforms from which to disseminate information about the province to tourists and other stakeholders in the tourism sector. Not only is this achieved through the personal communication of specific information to tourists from strategically located tourism information offices, both within and outside the
province, but also via the sophisticated Destination Management System, and an ever-increasing range of social media platforms. Furthermore, marketing collateral from TKZN is distributed extremely widely, nationally and internationally, via over 175 platforms – country embassies, consulates, tourism information offices, stakeholder partners, at trade shows – in several languages. The research division collects and collates a wide range of tourism statistics, tracking the performance of the tourism sector at a global level, nationally and provincially. Furthermore, it adds to the overall body of tourism knowledge of the province through a range of research studies. Several of these will constitute baseline studies required by the Tourism Master Plan.

The Durban KwaZulu-Natal Convention Bureau was set up as a joint initiative between the KZN Department of Economic Development, Tourism and Environmental Affairs in KZN in order to focus specifically on the opportunities held by business events for the province. In a very short space of time, since it opened its doors in 2010, it has assisted in winning in excess of forty bids, and brought in business to the value of well in excess of two billion Rand. The Convention Bureau has been integrated into Tourism KwaZulu-Natal as a special division of this entity.

It goes without saying that corporate governance remains pivotal to the organisation’s operation, complemented by the creation of an environment conducive to people development and motivation. Creating an enabling institutional environment is thus critical for successful delivery. A strong senior management team and overall committed team of employees underpin the delivery of the strategy.

2. INTRODUCTION

The KZN Provincial Tourism Master Plan (TMP) was commissioned by the provincial Department of Economic Development, Tourism and Environmental Affairs and was aimed at the development of a plan within which tourism could burgeon and achieve its full potential as a serious contributor to the economy of the province. It sets out the long-term vision and strategy for tourism in the province. The TMP has a long term 2030 vision, and specific targets are set for the milestone year of 2030.

Following extensive consultation with the many stakeholders of the tourism sector, the following vision statement was developed:

**VISION**

By 2030 KwaZulu-Natal will be globally renowned as Africa’s top beach destination with a unique blend of wildlife, scenic & heritage experiences for all visitors.
The TMP confirms that this vision encapsulates worldwide acceptance of the status of the KZN as being better than all other destinations for beach tourism in Africa, with a unique dimension added from KZN’s blend of wildlife, scenery and heritage to complement and augment that beach experience. The use of the word “experiences” indicates a move away from selling a geographic destination or products, to marketing, selling and developing what the visitors buy – an experience.

The vision also indicates the use of the core experience of the beach as the hook to develop tourism, but ensuring this reflects province-wide, and also ensuring that the other key experiences are stressed – wildlife, scenery and heritage. Finally “for all tourists and visitors” means that the focus is international, African, South African and the day visitor (KZN local residents) markets.

The TMP also espouses a Mission for tourism in KZN for this long-term horizon and outlines the key ways in which the vision will be achieved:

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

To provide greater context for TKZN’s strategic plan, it is worth mentioning the principles that underpin the TMP. These principles clarify some key tenets of how the strategy will be actualised:

- **We will market and promote** experiences. This will be underpinned by referring always to the experience first and to geography second.
- **Municipalities have different strengths in terms of tourism** and therefore are not equal in terms of tourism development potential. As in other sectors of the economy, different places have different strengths. Certain areas have major tourism strengths, less so. The level of emphasis on tourism development will thus differ from area to area.
- **Alignment with the national tourism strategy;**
- **Alignment with the National Development Plan, the New Economic Growth Path and the Provincial Growth and Development Plan.**

Strategy 2014-2018 positions KwaZulu-Natal in the global and national tourism markets as South Africa enters an era in which it plans to leverage off of:

- The successful hosting of the 2010 FIFA World Cup;
- The inclusion of South Africa as part of the BRICS economic block;
- The sustained growth in foreign tourist arrivals despite the global economic downturn and contraction in the global tourism market; and
- The increasing integration of the Southern African Development Community (SADC) and the growth in visitors from African neighbours for business and holidays.

The strategic plan sets out TKZN’s approach to dealing with tourism development, marketing imperatives and the related investment required in the province. It is rooted in a realistic acceptance that resources are limited and strategic choices therefore have to be made if goals and objectives are to be realistic and achievable.
As a public entity, TKZN has various stakeholder interests to deal with, including national, provincial and local government, the tourism trade and the private sector, host communities, international and domestic tourists, the media, the TKZN suppliers and internal staff. In this regard, the Strategic Plan recognizes all of its stakeholders’ expectations and TKZN’s deliverables with regard to these stakeholder expectations.

The Vision and Mission for TKZN is clarified and there is a focus on delivery by tasking TKZN to realise a clear five-year programme of actionable plans, supported by a robust budget. The plan is based on five interdependent strategic thrusts, derived from a thorough strategic review and analysis, each of which unfolds into a detailed programme of action plans, with associated budgets.

The strategic plan captures TKZN’s commitment to the people of KwaZulu-Natal, its intention to play a leading role in the development of tourism to become an increasingly significant contributor to the province’s economy, and at the same time spreading its benefits in a meaningful way to those who have been disadvantaged and marginalised by history.

The TMP has set out specific targets for the industry in each of the following areas:

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

The details of the targets for the milestone years of 2015, 2020, 2025 and 2030 are described in the TMP itself, but what is of major relevance is the fact that each of these indicators or terms of measurement, is directly relevant to the core business of TKZN, and thus the goals and targets TKZN’s Strategic Plan must talk to these indicators, and start to say what the contribution of TKZN is planned to be in relation to each of these.

Tourism Sector Overview

Tourism is increasingly being identified as a major contributor to the global economy, currently contributing an estimated 9.1% to the global Gross Domestic Product (GDP). South African tourism’s contribution to the country’s GDP was recorded at about 8.6% in 2011, accounting for approximately 1.2 million direct and indirect jobs.

The sector is able to generate employment opportunities without significant capital investment. It is estimates that about R1 million of tourism spend generates and sustains 10 annual direct and indirect jobs. Tourism outstripped gold as the leading generator of foreign exchange earnings in South Africa as far back as 2003, and in 2011 generated some R74 billion
in foreign direct spend into the country. In KwaZulu-Natal, tourism total contribution to GGP is standing at about R28.2 billion – about 6.4% of the provincial economy. The province currently attracts about 908,277 foreign visitors and 7.1 million domestic tourism trips on an annual basis.

TKZN has demonstrated just how significant the tourism sector is to the growth of the provincial economy. The province has wonderful natural tourism attractions and is thus well positioned to take advantage of the continued growth in international and domestic tourism.

It is hoped that the plans set out in this Strategic Plan receive the support and investment to realize the vision of making KZN Africa’s leading tourism destination.

3. OUR VISION

To position the province of KwaZulu-Natal as Africa’s leading tourism destination, nationally and internationally.

4. OUR MISSION

To initiate, facilitate, co-ordinate and implement:

- Strategic tourism marketing, and
- Demand-driven tourism development programmes

Which grow tourism, thereby serving to achieve:

- The transformation of the tourism sector within the province; and providing
- Economic benefits to all stakeholders and the province.

5. OUR VALUES

- We value the contribution of our people by recognising their performance and appreciating them as people.
- We all strive for superior delivery of customer service both internally and externally.
- We are committed to making KZN the top destination in Africa.
- In performing our duties we will trust each other to be honest and reliable.
- We will respect each other and communicate in a way that demonstrates this.
- In all our dealings we will act with integrity, so that people trust us.
- Through our professionalism, people will value dealing with us.
- Team spirit is what will make TKZN a great place to work!

6. ROLES

The roles set out below highlight that that are critical and must be read with those detailed in the Tourism White Paper.

6.1 ROLE OF THE PROVINCIAL GOVERNMENT
At the provincial level, the provincial government takes on similar functions as at the national level”, and be the provincial partner of the National department of Tourism.

In addition to these functions, the Department should work closely with the province’s DMO and municipalities to:

a. Implement National principles, objectives and policy guidelines as is appropriate to local conditions;
b. Deliver on legislative and statutory obligations;
c. Develop Provincial tourism Policies and support municipalities in developing local tourism policies;
d. Public sector co-ordination to ensure an Integrated Tourism Development approach;
e. Co-ordinate and support municipalities to integrate Tourism into their Integrated Development plans, and, to deliver on their public sector mandate in regard to tourism;
f. Develop a master plan for tourism in KZN that sets out the key strategic objectives and the plan to achieve these objectives;
g. Facilitate the development of market-driven products and services, in response to the DMO’s market intelligence;
h. Investment facilitation through existing provincial and local agencies;
i. Spatial development co-ordination;
j. Quality Assurance;
k. Registration of tourism businesses;
l. Registration of tourist guides;
m. Champion, monitor, evaluate and report on transformation, and in particular on BBBEE; and finally to
n. Play a prominent role in tourism development activities such as:
   i. The involvement of local communities;
   ii. Environmental management;
   iii. Safety and security of visitors;

6.2 ROLE OF PROVINCIAL DESTINATION MANAGEMENT ORGANISATION (DMO)

International best practice has proven that an independent public entity is the best institutional structure to carry out the functions of provincial tourism marketing. It is recommended that the structure of provincial DMO reflect as closely as possible the National DMO.

The role of the Provincial DMO is to:

A. Develop the tourism brand for the province;
b. Develop a Domestic Plan strategy;
c. Develop and agree the international marketing strategy and programmes with South African Tourism (SAT);
d. Market and promote the province in competition with other provinces;
e. Align provincial marketing strategy and programmes to SAT’s programmes;
f. Execute provincial initiatives in markets province develops independently and where National presence is non-existent;
g. Support district and local DMO’s to:
   i. Develop marketing strategies;
   ii. Identify market-driven experience offerings;
   iii. Linking previously disadvantaged product and services providers to tourism markets;
iv. and with the implementation support in pursuit with destination marketing
   Develop experience
h. Co-ordinate marketing initiatives with private sector partners and other relevant
   stakeholders;
i. Undertake Destination Development Planning – to inform the development of the
   province’s experience offerings based on market intelligence;
j. Create a Tourism Knowledge Management system based ongoing research;
k. Monitor and report on Tourism growth in the province;

6.3 ROLE OF THE DISTRICT MUNICIPALITY (DM)

Integrating provincial tourism objectives into District plans and priorities;
a. Driving the development of and implementation of local tourism policy;
b. Urban and rural planning and development of tourism products and services;
c. Budget for the effect implementation and growth of tourism in line with the
   Provincial objectives;
d. Allocate Institutional capacity and dedicated and skilled Human resources to perform
   tourism functions;
e. provision and maintenance of tourist services, sites and attractions and public
   services;
f. provision of local infrastructure;
g. Creation and co-ordination of tourism experience routes across its district and
   beyond municipal boundaries;
h. market and promote specific local attractions; and
i. Providing Tourism support to entrepreneurs and investors.

7. OUR MARKETS

In line with the approach adopted by South African Tourism’s (SAT) the Market Segmentation,
TKZN recognises it has limited resources at it disposal. Thus, a targeted approach, as to which
markets upon which to focus tourism marketing, has been adopted. To this end, TKZN has
considered the latest portfolio of countries published by SAT in identifying its target market.
It should be noted that our market segmentation has also considered and included other
markets where SAT is not present based on our own competitive and comparative advantage
of our tourism experiences offerings.

<table>
<thead>
<tr>
<th>Market</th>
<th>Geographic Scope</th>
<th>Target Segments</th>
<th>Core Experiences</th>
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<tbody>
<tr>
<td>Domestic</td>
<td>• KZN</td>
<td>• New Horizon families</td>
<td>• Beaches</td>
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<td></td>
<td>• Gauteng</td>
<td>• High-life enthusiasts</td>
<td>• Natural beauty</td>
</tr>
<tr>
<td></td>
<td>• Western Cape</td>
<td>• Well-to-do Mzansi families</td>
<td>• Nightlife</td>
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<td></td>
<td>• Eastern Cape</td>
<td>• Spontaneous budget explorers</td>
<td>• Shopping</td>
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<td></td>
<td>• Free State</td>
<td>• Seasoned leisure seekers</td>
<td>• Heritage</td>
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<tr>
<td>SADC Rest of</td>
<td>• Swaziland</td>
<td>• Business professionals</td>
<td>• Culture</td>
</tr>
<tr>
<td>Africa</td>
<td>• Lesotho</td>
<td>• Traders</td>
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<td>• Botswana</td>
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<td>• Mozambique</td>
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<td>• Nigeria</td>
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<td></td>
<td>• Angola</td>
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</tr>
</tbody>
</table>
| Europe | Core | Opportunity | Investments | Strategic Hub | • Natural beauty  
| Americas | • United Kingdom  
| Asia | • USA  
| • Germany  
| • France  
| • Netherlands  
| • Australia  
| • India  
| • China  
| • Brazil  
| • Sweden  
| • Eastern Europe (Russia)  
| • Middle East (GCC countries)  
| • NSSA, Wanderlusters,  
| • Family explorers  
| • New beach lovers  
| • Natural beauty  
| • Wildlife  
| • Culture  
| • Visiting mountains  
| • Beach  
| • Adventure (USA wanderluster)  

### Tourism KwaZulu-Natal will focus it’s business event marketing efforts as follows:

<table>
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<tr>
<th>Segment</th>
<th>Focus</th>
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</table>
| Association Meetings  
| Government Meetings | Primary |
| Incentives  
| Other forms of Corporate Meetings | Secondary |
| Exhibitions | Pioneering |

8. **CRITICAL SUCCESS FACTORS**

a) A shared vision and strategic and inspirational leadership.

b) Passionate, committed and appropriately rewarded/incentivised staff who take ownership of the strategy and strive to excel individually and collectively.

c) A bias for action and a commitment to implementation at all levels.

d) Adequate resources (human, financial and facilities).

e) An internationally benchmarked 5-year rolling strategic plan, underpinned by annual measurable action and tactical plans.

f) Continuous monitoring, evaluation and benchmarking of individual, departmental and organizational performance.

g) Transparent and constant two-way communication at all levels.

h) Seamless and mutually beneficial partnerships at all levels.

i) Adherence to corporate governance and ethical behaviour.

j) Alignment and co-ordination at all levels (locally, provincially and nationally).

k) Fostering a culture of innovation and creativity among all staff.

l) Based on a foundation of reliable and accurate information.

9. **OUR GOALS AND OBJECTIVES**
TKZN’s overarching goals as set out in the provincial Tourism Master Plan are:

<table>
<thead>
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<th>Currently</th>
<th>2017</th>
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<tr>
<td>GGP contribution</td>
<td>±R28.2 bn</td>
</tr>
<tr>
<td>Employment</td>
<td>128 547</td>
</tr>
</tbody>
</table>

**Transformation**

- To encourage the private sector to achieve national Tourism Broad Based Black Economic Empowerment (BBBEE) scorecard targets and to report on the sector’s achievements.
- To ensure that the Public sector and its Agencies act in accordance with the BBBEE scorecard.
- TKZN will monitor its own procurement to ensure compliance with BBBEE.

*Note – targets as per KZN TMP

TKZN is strongly cogniscent of the fact that, as a provincial marketing and promotions agency, it has varying degrees of influence and control over many of these indicators, with its control and influence decreasing as the levels increase. Thus TKZN has the most control over influencing the tourism sector and related indicators at a very local level, somewhat less at a provincial level, and almost none at a global level. Nevertheless, these indicators are still the focus of the organization. These goals above will thus be realized by concentrating on key destination “wellness” indicators, which will become TKZN’s focus:

<table>
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<tr>
<th>Objective</th>
<th>Performance indicator</th>
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<tbody>
<tr>
<td>Increase foreign arrivals</td>
<td>Number of foreign tourists, % Growth in visitor numbers</td>
</tr>
<tr>
<td>Increase share of domestic trips</td>
<td>Average spend per tourist, Forex earnings from tourism, %</td>
</tr>
<tr>
<td>Increase tourism spend</td>
<td>Average spend per tourist per trip</td>
</tr>
<tr>
<td>Reduce foreign seasonality</td>
<td>Attempt to achieve a seasonality index of 1.2 per annum (to change)</td>
</tr>
<tr>
<td>To increase business tourism in the province hosted in the province.</td>
<td>Improvement in the ICCA (International Congress and Conferencing Association) and SITE ranking in KZN, Number of MICE, conferences, and congresses hosted</td>
</tr>
<tr>
<td>Increase geographic spread</td>
<td>In case of domestic tourists, at least two destinations visited per trip, In the case of foreign tourists, at least three destinations visited per trip</td>
</tr>
</tbody>
</table>
Improve destination image and service excellence.
- % increase in top of mind destination brand awareness
- % increase and/or positive ratings with regard to:
  - Perceptions of value for money
  - Perceptions of safety and security
  - Perceptions of being a welcoming destination
  - Perceptions of the authenticity of KZN's product

Responsible and demand driven Tourism Development and accessibility
- No of Tourism Awareness initiatives
- Perceptions of KZN's historical and cultural product
- Perception of the ability to travel year round in KZN
- Perceptions of KZN's natural wildlife experience
- Annual Service Excellence Awards
- % increase in number of disabled tourists friendly facilities

Strategic leadership
- Number of Memoranda of Understanding (MOUs) and partnerships concluded
- Number of Joint Marketing Agreements (JMAs) concluded
- Level of alignment at national, provincial and local levels
- Level of synergy between TKZN and SAT plans

Transformation
- % increase in the number of SMME businesses supported.
- % increase in budget spent on SMME service providers.
- % increase in training and capacity building interventions.

Enabling environment
- % spent on administrative expenditure vis a vis line function expenditure
- % achievement of employment equity targets
- % procurement from BEE suppliers
- Number of staff members and % spent on developmental training

10. TKZN'S OVERALL STRATEGIC FRAMEWORK

TKZN's approach to the development and promotion of tourism in the province will be predicated on a strategic framework that seeks to guide and assist the organization, its stakeholders and partners to make appropriate considered choices to realize the objectives set out above. In addition, the framework aims to provide parameters for synergy and consistency in provincial tourism marketing initiatives and programmes.

There are four key elements to the framework:

- Our approach;
- Our brand;
- Our partners; and
- Our people.

10.1 OUR APPROACH

TKZN has recognized the importance of understanding the close interrelationship between the tourism product and marketing efforts of the province. It is on this basis that it has established a strategic decision-making framework, which aims to ensure that the limited resources at hand are effectively and efficiently spent. Furthermore, infrastructure support is
also very important in unlocking tourism, particularly in rural areas where access can become a hindrance for the development of a sustainable tourism economy.

<table>
<thead>
<tr>
<th>Our Approach</th>
<th>Understand the market</th>
<th>Choose the attractive segments</th>
<th>Market the destination</th>
</tr>
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</table>

10.2 OUR BRAND

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

![South Africa KwaZulu-Natal Zulu Kingdom. Exceptional](image)

Other geographic areas below the provincial level have the option of using the provincial SA brand, or using any other geographic nomenclature within the SA brand icon. Appropriate brand manual shall be developed to guide the use and adoption of the brand by the various stakeholders within the province. This brand manual shall be reviewed and updated on an ongoing basis to ensure continued alignment with the South Africa brand as well as various developments within the province.

10.2.1 Managing the Brand

During this planning period the new destination brand and logo will be monitored in terms of impact, relevance, stakeholder buy-in and distinctive positioning. Where necessary, the brand will be adapted to ensure optimal destination image projection and distinctive positioning.

TKZN will play a lead role together with Trade and Investment KwaZulu-Natal and the Economic Development, Tourism, and Environmental Affairs (EDTEA) to drive and align the destination branding within a common framework for the Province particularly amongst local government and provincial public entities. From a tourism and investment promotion perspective, every effort will also be made to ensure the destination brand refinement will bring the KZN brand strategy in line with South African Tourism and Brand South Africa. TKZN will work in establishing brand synergy with strong private sector brands, which can help in growing destination awareness and tourist arrivals into the province.

To consolidate all branding efforts in order to unpack the various elements that constitute the destination brand, we engaged in an insight activator process. The brand key was identified and this led to the new brand essence whilst establishing the unique differentiators. Our destination brand key is as follows:
Pay off line (tag line):

The destination brand is positioned as the EXCEPTIONAL – Zulu Kingdom. The new pay off line was derived and based on the brand equity that existed for the Zulu Kingdom brand. The KZN brand resonates with the brand SA pillars:

- The new brand identity and pay-off line: ‘Zulu Kingdom. Exceptional’ allowed KZN to hold on to past brand equity and the unique differentiator “Zulu” whilst also resonating with the then SA Brand pay offline “Alive with possibilities”.
- The essence of the new positioning was to focus more on marketing key destination experiences and less about sub destinations as was previously done

Brand Attributes:

Meaningful distinctiveness is a catalyst for growth. In this regard, the Zulu Kingdom’s experiences are unique and follow through on the brand’s driving attributes. These are:

- Heritage;
- Adventure;
- Trade Gateway;
• Zulu;
• Beaches.

The golden thread that is a common characteristic in all KZN attributes are:
• Warmth;
• Fun; and
• Family-Oriented.

It should be noted that each one of these attributes have a singular and a collective stance as depicted below:

As a destination, we position the brand attributes through the brand payoff line and hence the destination “possess” the exceptional experiences all around.

With the new brand and the provincial tourism master plan, TKZN will focus on marketing and promoting experiences as opposed to specific geographic regions within the province. The tourism master plan has identified specific experiences which should be prioritise for marketing and promotion of the province. These are:

➢ BEACH;
➢ SCENIC BEAUTY;
➢ WILDLIFE; and
➢ HERITAGE/CULTURE.

In addition to the above, there is also a need for a special focus on developing niche tourism markets/experiences where the province has a competitive or comparative advantage. These include cruise tourism, diving tourism, golf tourism, events tourism, etc. This does not exclude any other interested stakeholders or municipalities to focus on other experiences or niches outlined within the brand. Our positioning for the business events market will be the fact that we will strive to offer an exceptional experience that goes beyond the successful hosting of a business event.
10.3 OUR PARTNERS

TKZN recognizes that it will not deliver upon its mandate unless it is able to work in partnership with the large number of stakeholders and institutions responsible for the development and promotion of tourism within the country. TKZN aims not only to coordinate its activities with its partners, but also to add value to their core competencies.

The organization’s partners can be divided into the following core categories:

- Those organizations which fall within the responsibility of EDTEA;
- The National Department of Tourism and SAT;
- Other national and provincial government departments and public sector public entities;
- District and local municipalities;
- Private sector operators and registered service providers within the tourism sector in KZN and source markets;
- The private sector tourism industry more broadly including business events decision makers;
- TKZN’s suppliers and partners which assist in the delivery of its core services;
- SA embassies in core international markets;
- Local government and locally-based tourism promotional institutions.
- Organised Labour

The strategic framework will encourage more effective alignment of public and private sector marketing organisations in the province. Whilst proactively encouraging the development of a vibrant locally-based tourism sector, TKZN will strive to ensure that an effective vertical alignment occurs with institutions at national, district and local spheres of government, in line with the requirements of the Constitution and national and provincial legislation.

TKZN recognizes that the success of its promotional, marketing and developmental efforts rests heavily on the ability of the organization to align its activities with those of its partners, ensure synergy and facilitate constant communication of its core objectives, responsibilities and activities to these core stakeholders. In the implementation of its strategy, the organization will prioritise its relationship with its partners. To this end, TKZN sees its role as creating cost-effective platforms from which local and regional stakeholders can promote product specific attractions and tourism services to specific market sectors. Where appropriate, TKZN will also link into existing platforms created by either the public or private sector stakeholders in order to leverage marketing and development spend in support of our brand.

The role of the tourism private sector in source markets particularly the outbound tour operators is very critical. With regard to international source markets, most of the engagement with the consumer happens, to a large extent, through these tour operators. Therefore, it is important that strategic relationships be formed and sustained with such tour operators.

10.4 OUR PEOPLE

TKZN recognizes that the success of its strategy rests upon the ability of the organization to
put its people, both of the province, and employees, at the centre of its activities. To this end, the organization will prioritise the employment of people who will add value to the core competencies and responsibilities of the organization, and do all possible to delegate the authority responsibly to all levels of staff within the organization so as to provide a more effective service to the public at large.

At the same time, a successful tourist destination rests upon the ability of the people of a destination to provide visitors with a warm and friendly experience. To this end, TKZN will prioritize and continuously improve its communication efforts with the people of KZN to ensure that they are kept abreast of tourism developments and act as ambassadors for the promotional efforts of TKZN.

11. **STRATEGIC KEY ROLES**

The strategic review process focused TKZN’s mandate and the key roles and responsibilities emanating from this. These roles are clearly inter-dependent and require the formation of partnerships at all levels. These are essentially:
## Policy, Research, Monitoring, Management

<table>
<thead>
<tr>
<th>Name of Public Entity</th>
<th>Tourism KwaZulu-Natal</th>
</tr>
</thead>
</table>

### Description of Implementation Plan (Strategic Initiative)

Drive tourism intelligence research to give insight into destination packaging, marketing and selling interventions.

### Output Description

<table>
<thead>
<tr>
<th>Output Description</th>
<th>Estimated Five Year Budget Requirement</th>
<th>Budget Shortfall (if applicable)</th>
<th>Constraints that may hinder deliverable</th>
<th>PGDP Indicator linked to</th>
<th>Quantifiable Deliverables</th>
<th>Other Information (Beneficiaries, Job Created, Partners, etc)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct a baseline study on transformation in KZN’s tourism industry and implement, with EDTEA, the transformation plan.</td>
<td>600 000</td>
<td>600 000</td>
<td>N/A</td>
<td>1.2 Enhance sectoral development through trade and investment</td>
<td>Baseline study completed and develop transformation plan</td>
<td>Transformation plan implementation ongoing</td>
</tr>
<tr>
<td>Conduct major research on international tourists to understand and further develop the experiential marketing approach to ensure it is, and remains, relevant and accurate to market needs, and monitor</td>
<td>100 000</td>
<td>N/A</td>
<td>N/A</td>
<td>1.2 Enhance sectoral development through trade and investment</td>
<td>Research concluded and findings incorporated into marketing strategy</td>
<td>Ongoing monitoring and review of marketing strategy</td>
</tr>
</tbody>
</table>

**March 2015 Planned Target**: Baseline study completed and develop transformation plan

**March 2016 Planned Target**: Transformation plan implementation ongoing

**March 2017 Planned Target**: Transformation plan implementation ongoing

**March 2018 Planned Target**: Transformation plan implementation ongoing

**Five Year Planned Target**: 90% compliance with the tourism sector codes as per the Tourism Master Plan

**Beneficiaries**: BBBEE enterprises

**Partners**: Organised tourism bodies

**NDT and EDTEA.**

**Beneficiaries**: KZN tourism enterprises

**Partners**: Tourism trade

**NDT**

**SAT**
<table>
<thead>
<tr>
<th>the marketing strategy implementation.</th>
<th>N/A</th>
<th>N/A</th>
<th>N/A</th>
<th>1.2 Enhance sectoral development through trade and investment</th>
<th>Ongoing tourism information provision and management of 8 tourism information centres across South Africa.</th>
<th>Ongoing tourism information provision and management of 8 tourism information centres across South Africa.</th>
<th>EDTEA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and roll out a comprehensive tourism information provision and tourism information centre strategy</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>Open new information offices in the Free State, O.R. Tambo International Airport and Soweto, Johannesburg</td>
<td>Ongoing tourism information provision and management of 8 tourism information centres across South Africa.</td>
<td>Ongoing tourism information provision and management of 8 tourism information centres across South Africa.</td>
<td>EDTEA</td>
</tr>
</tbody>
</table>

**Beneficiaries**
- Tourists, academics and general public
- Tourism enterprise

**Job Creation**
- 6

**Partners**
- EDTEA, District Municipalities, CTAs, CTOs and tourism enterprise
## Planning and Development

### Name of Public Entity

<table>
<thead>
<tr>
<th>Name of Public Entity</th>
<th>Tourism KwaZulu-Natal</th>
</tr>
</thead>
</table>

### Description of Implementation Plan (Strategic Initiative)

Drive demand-driven tourism development, working with investors, to enhance the destination’s offerings and drive greater international and national arrivals.

### Output Description

<table>
<thead>
<tr>
<th>Output Description</th>
<th>Estimated Five Year Budget Requirement</th>
<th>Budget Shortfall (if applicable)</th>
<th>Constraints that may hinder deliverable</th>
<th>PGDP Indicator linked to</th>
</tr>
</thead>
<tbody>
<tr>
<td>In conjunction with EDTEA, implement the Zulu Heritage Route development, including the construction of the King Shaka statue</td>
<td>To be funded by EDTEA</td>
<td>N/A</td>
<td>Capital investment for the statue</td>
<td>1.2 Enhance sectoral development through trade and investment</td>
</tr>
<tr>
<td>In partnership with eZemvelo KZN Wildlife, Isimangaliso and private game reserves, develop and market the wildlife experience</td>
<td>R5 000 000</td>
<td>N/A</td>
<td>1.2 Enhance sectoral development through trade and investment</td>
<td></td>
</tr>
</tbody>
</table>

### Quantifiable Deliverables

<table>
<thead>
<tr>
<th>March 2015 Planned Target</th>
<th>March 2016 Planned Target</th>
<th>March 2017 Planned Target</th>
<th>March 2018 Planned Target</th>
<th>Five Year Planned Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zulu Heritage Route plan approved and funded</td>
<td>Implement the Zulu Heritage Route development plan approved and funded</td>
<td>Package and market the Zulu Heritage Route</td>
<td>Market the Zulu Heritage Route</td>
<td>Finalise the Zulu Heritage Route and Iconic Visitor attraction centre</td>
</tr>
<tr>
<td>Package and market the KZN wildlife experience for inclusion into tour operator</td>
<td>Package and market the KZN wildlife experience for inclusion into tour operator</td>
<td>Package and market the KZN wildlife experience for inclusion into tour operator</td>
<td>KZN’s wildlife experience packaged and sold by 10 key tour operators</td>
<td></td>
</tr>
</tbody>
</table>

### Other Information (Beneficiaries, Job Created, Partners, etc)

Beneficiaries: Surrounding communities

Partners: Ezmvelo, private game reserves, Isimangaliso Wetlands Park
<table>
<thead>
<tr>
<th>Description</th>
<th>Budget 1</th>
<th>Budget 2</th>
<th>Budgetary Constraints</th>
<th>Brochures</th>
<th>Brochures</th>
<th>Brochures</th>
<th>Operator Brochures</th>
<th>Beneficiaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and implement a comprehensive tourism signage strategy</td>
<td>R5 000 000</td>
<td>5 000 000</td>
<td>Brochure</td>
<td>A total of 100 new tourism signs erected around the province</td>
<td>A total of 100 new tourism signs erected around the province</td>
<td>A total of 100 tourism signs erected around the province</td>
<td>A total of 400 tourism signs erected around the province</td>
<td>Beneficiaries: Municipalities, tourism enterprises and attractions</td>
</tr>
<tr>
<td>Identify and support SMME tourism projects that support the tourism strategy, with emphasis on rural tourism development</td>
<td>R10 000 000</td>
<td>N/A</td>
<td>Brochure</td>
<td>A total of 5 SMME tourism projects supported through feasibility studies, business plans and investment facilitation</td>
<td>A total of 5 SMME tourism projects supported through feasibility studies, business plans and investment facilitation</td>
<td>A total of 5 SMME tourism projects supported through feasibility studies, business plans and investment facilitation</td>
<td>A total of 20 SMME tourism projects supported through feasibility studies, business plans and investment facilitation</td>
<td>Beneficiaries: SMME enterprises</td>
</tr>
<tr>
<td>Identify and support infrastructure development and tourism projects that support</td>
<td>3 000 000</td>
<td>2 000 000</td>
<td>Brochure</td>
<td>Database of infrastructure</td>
<td>S infrastructure</td>
<td>S infrastructure</td>
<td>15 infrastructure</td>
<td>Beneficiaries: Affected communities</td>
</tr>
<tr>
<td>the tourism strategy.</td>
<td>through trade and investment</td>
<td>re development and tourism projects developed</td>
<td>developme nt and tourism projects Support through investment facilitation and investment forum</td>
<td>developme nt and tourism projects Support through investment facilitation and investment forum</td>
<td>developme nt and tourism projects Support through investment facilitation and investment forum</td>
<td>developme nt and tourism projects Support through investment facilitation and investment forum</td>
<td>Partners Funding institution : COGTA Provincial DOT EDTEA TIKZN Municipalities NDT SANRAL Job creation TBA</td>
<td></td>
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</table>
## HRD and Service Excellence

<table>
<thead>
<tr>
<th>Name of Public Entity</th>
<th>Tourism KwaZulu-Natal</th>
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</thead>
<tbody>
<tr>
<td>Description of Implementation Plan (Strategic Initiative)</td>
<td>Drive the transformation of and service excellence within the tourism industry</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Output Description</th>
<th>Estimated Five Year Budget Requirement</th>
<th>Budget Shortfall (if applicable)</th>
<th>Constrains that may hinder deliverable</th>
<th>PGDP Indicator linked to</th>
<th>March 2015 Planned Target</th>
<th>March 2016 Planned Target</th>
<th>March 2017 Planned Target</th>
<th>March 2018 Planned Target</th>
<th>Five Year Planned Target</th>
<th>Other Information (Beneficiaries, Job Created, Partners, etc)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement, with significant resources, the transformation plan, including SMME and business support</td>
<td>R10 000 000</td>
<td>R5 000 000</td>
<td>N/A</td>
<td>1.2 Enhance sectoral development through trade and investment</td>
<td>20 new SMMEs on TKZNs Incubation programme run with established trade partners</td>
<td>20 new SMMEs on TKZNs Incubation programme run with established trade partners</td>
<td>20 new SMMEs on TKZNs Incubation programme run with established trade partners</td>
<td>20 new SMMEs on TKZNs Incubation programme run with established trade partners</td>
<td>80 new SMMEs on TKZNs Incubation programme run with established trade partners</td>
<td>SMME enterprises</td>
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<td>Afriportico brand marketing</td>
<td>Afriportico brand marketing</td>
<td>Afriportico brand marketing</td>
<td>Afriportico brand marketing</td>
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<td>Beneficiaries Afriportico members</td>
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<td>Partners Afriportico members</td>
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<td>Tourism trade</td>
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<table>
<thead>
<tr>
<th>Beneficiaries</th>
<th>Tourism trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive KZN initiatives to implement the national service excellence campaign, linked to SABS standards.</td>
<td>R10 000 000</td>
</tr>
</tbody>
</table>
### Marketing

<table>
<thead>
<tr>
<th>Name of Public Entity</th>
<th>Tourism KwaZulu-Natal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description of Implementation Plan (Strategic Initiative)</strong></td>
<td>Drive targeted, conversion-based, destination marketing with tourism trade</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Output Description</th>
<th>Estimated Five Year Budget Requirement</th>
<th>Budget Shortfall (if applicable)</th>
<th>Constraints that may hinder deliverable</th>
<th>PGDP Indicator linked to</th>
<th>Quantifiable Deliverables</th>
<th>Other Information (Beneficiaries, Job Created, Partners, etc)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and implement a campaign to stimulate a culture of travel amongst previously disadvantaged South Africans, including promoting tourism awareness and understanding (Run a domestic campaign to encourage travel - Holiday Swap Campaign).</td>
<td>R28 000 000</td>
<td>R16 000 000</td>
<td>Budget availability for the 2015/16, 2016/17, 2017/18 financial years</td>
<td>1.2 Enhance sectoral development through trade and investment</td>
<td>1 season of Holiday Swap, amounting to 13 episodes</td>
<td>1 season of Holiday Swap, amounting to 13 episodes</td>
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</tbody>
</table>

9 164 806 domestic trips taken as per TMP target | Partners | Tourism trade |
| Increase the number of business, sports and leisure events in the Province. | Creation of a bid fund | 1.2 Enhance sectoral development through trade and investment | Continuously bid for big international events through the Convention Bureau | Continuously bid for big international events through the Convention Bureau | Continuously bid for big international events through the Convention Bureau | KZN in top 100 of ICCA ranking | Beneficiaries | Local communities  
Partners  
Major Events Sub-Committee, EDTEA, NCB, SASCOC, various professional associations |
|---|---|---|---|---|---|---|---|
| Finalise and activate marketing by experience – including international, regional and domestic and cover targets, tools, distribution channels, packaging and routes. | 65 500 000 | N/A | Marketing strategy focused on experiences implemented | Marketing strategy focused on experiences implemented | Marketing strategy focused on experiences implemented | 1 405 676 internatio nal trips undertak en tourist arrivals as per TMP target | Beneficiaries | Destination  
Partners  
Organised tourism bodies |
| Increase the number of business, sports and leisure events in the Province. | Creation of a bid fund | 1.2 Enhance sectoral development through trade and investment | Continuously bid for big international events through the Convention Bureau | Continuously bid for big international events through the Convention Bureau | Continuously bid for big international events through the Convention Bureau | KZN in top 100 of ICCA ranking | Beneficiaries | Local communities  
Partners  
Major Events Sub-Committee, EDTEA, NCB, SASCOC, various professional associations |
| Finalise and activate marketing by experience – including international, regional and domestic and cover targets, tools, distribution channels, packaging and routes. | 65 500 000 | N/A | Marketing strategy focused on experiences implemented | Marketing strategy focused on experiences implemented | Marketing strategy focused on experiences implemented | 1 405 676 internatio nal trips undertak en tourist arrivals as per TMP target | Beneficiaries | Destination  
Partners  
Organised tourism bodies |
11.1 Strategic leadership and tourism brand custodian

TKZN will strive to ensure an aggressive brand positioning to promote brand awareness in all the province’s key markets. This will be done through, among others, the promotion of unique experiences offered in the province.

This will be realised through:

11.1.1 Creating a strong, integrated brand

- Establish a clear unique brand positioning.
- Increase brand awareness in key target markets.
- Promote KZN as a value-for-money province.
- Innovate in TKZN’s marketing approach – e.g. Exploit Word-of-Mouth (WOM) as a communication channel by making the people of the province its own ambassadors.
- Maintain risk management.

11.1.2 Addressing access issues in collaboration and partnership with relevant stakeholders (air, sea, rail and ground)

- Lobby actively to resolve critical tourism access needs
- Activate airlift development strategy
- Activate cruise tourism strategy
- Facilitate infrastructure development that support tourism sustainability and growth e.g. roads, telecommunications, water, signage, etc.
- Activate rail tourism strategy

11.1.3 Creating alignment and synergy within the industry

- Align TKZN’s activities with those of government at national, provincial and local levels as well as the tourism trade to ensure maximum efficiency.
- Align provincial tourism nodes identified in terms of the Tourism Master Plan with those identified by the National Department of Tourism.
- Synergised planning with South African Tourism (SAT).
- Collaborative initiatives with surrounding provincial and regional tourism stakeholders (e.g. in Lesotho and Mozambique)
• Mutually beneficial strategy to mobilise collaborative partnerships with “non-tourism” stakeholders such as leading banks, soft drinks companies etc. to facilitate co-branding and cross marketing opportunities.
• Support regional integration by partnering with SADC countries in specific tourism route development and promotion (e.g. Maloti-Drakensberg initiative; East 3 Route).

11.2 **Generic Promotion**

Marketing and promotion of the province is the foundation of TKZN and has been proven successful in recent years. In the next five years it will continue to account for the major spend of TKZN’s financial resources.

**Domestically**, KZN remains the most visited province in South Africa and TKZN remains committed to defending this position in the face of increasingly concerted competition from other provinces. TKZN will implement an innovative domestic marketing strategy that aims to increase domestic arrivals and lengths of stay, thereby improving tourism spend. It will focus on the target segments in the following key source markets: KZN, Gauteng, Western Cape, Eastern Cape and Free State. In this instance our route to market will focus on engaging both the trade as well as the consumers through greater destination and “top of mind” brand awareness.

To achieve this, TKZN will:

11.2.1 **Lead Domestic Marketing of the Province**

• Invest in aggressive Above The Line (ATL) and Below The Line (BTL) campaigns to increase brand awareness and conversion.
• Move towards experience vs. product (destination) marketing, in line with consumer needs.
• Create brand alignment and synergy with sub-brands.
• Provide promotional tools and create platforms to market priority destinations.
• Strengthen inter- and intra-provincial marketing campaigns to defend domestic market share.
• Establish KZN as an “all-year-round” destination in an attempt to decrease tourism seasonality.
• Set up excellent trade relationships with key partners.
• Initiate trade insight understanding and channel segmentation for better understanding of the tourism trade segments and agreed relevant approaches for each (including SMMEs).
• Continue hosting familiarization and educational trips.
• Participation in relevant trade and consumer shows and workshops.

11.2.2 **Create Joint Marketing Agreements (JMAs) and Memoranda of Understanding (MOUs) with strategic partners.**

• Partnerships with private sector entities geared towards creating growth of the industry and “stretching the rand”.
• Partnerships with other public entities to grow the industry.
• Strategic alliances with other provinces to complement TKZN’s product offering.
• Strengthen partnerships with the media.
11.2.3 Drive Internal Marketing and Policy Advocacy

- Market TKZN to its local citizens, the media and the community at large
- Marketing campaign for people of the province to be positive and also communicate positively to current and prospective tourists

11.3 International Marketing

TKZN’s international marketing strategy will be aligned with South African Tourism’s international marketing drive. To this end, TKZN will place particular focus on the core international markets identified by SAT, namely Africa (SADC), Germany, UK, USA, Netherlands, France, Australia, and the BRIC (Brazil, Russia, India, China) markets.

In this regard, our focus areas will be to:

11.3.1 Grow International Arrivals

- Leverage off SAT’s marketing effort for international markets.
- Focus marketing efforts in core source markets aligned to SAT segments with particular focus on SADC and Africa, which contribute 60% of KZN’s arrivals.
- Strengthen international trade relations in strategic markets.
- Ensure representation in key source markets.
- Durban. Retain Indaba in Durban.
- Implement the international group tourism strategy focused on group tours, cruise tourism and charter markets.
- Develop and implement a best-seller recognition award programme for source market tour operators.

11.3.2 Implement tactical “Volume Drivers”

- Implement tactical seasonality and tourist dispersal campaigns.
- Marketing through events to raise destination profile, combat seasonality and spread the benefits of tourism to other destinations in the province.

11.3.3 Create Joint Marketing Agreements (JMAs) and Memoranda of Understanding (MOUs) with strategic partners.

- Partnerships with private sector entities geared towards creating growth of the industry and “stretching the rand”.
- Strategic alliances with other provinces to complement TKZN’s tourism product offering.
- Strengthen partnerships with the media.

11.3 Responsible and Demand-driven Tourism Development and Accessibility

TKZN is committed to responsible tourism practices at all levels. This ranges from the commitment to transformation in the industry to responsiveness to global climate change.
Critical to the execution of its tourism mandate to develop and grow tourism in the province will be the leveraging of resources – both financial and otherwise – as well as cross-sectoral collaboration. TKZN will forge strategic partnerships with role-players in the tourism trade and public sector aimed at optimal and responsible development of tourism within the province.

Actions to be taken in this regard will be to focus on:

11.4.1 Tourism destination development

- Encourage innovation in the diversity of product offering, e.g. new routes and experiences to address product gaps as well as enhancing destination competitiveness.
- Proactively identify and match product offerings to key market segments.
- Ensure all products supported or facilitated conform to the edicts of responsible tourism including assessments of environmental, social and economic impacts.

11.4.2 Investment Promotion

- Encourage demand driven tourism development by initiating strategic investment packaging.
- Identify and participate at strategic investment promotion platforms to promote investments opportunities in the province in collaboration with other stakeholders.
- Identify and engage strategic investors on an ongoing basis on opportunities in the province.

11.4.3 Universal Accessibility

- Facilitate access for disable tourists throughout the province.
- Ensure that focus on the disabled tourist is a cross-cutting initiative that is addressed in all relevant strategies and programmes for TKZN.

11.5 Transformation

The test of the success of the province’s Tourism Growth Strategy is in its contribution to direct economic benefit for the people of KZN. TKZN remains committed to assisting previously marginalised members of society in their efforts to actively participate in the provincial tourism industry through the promotion of their product offering, whilst acknowledging that its role here is primarily facilitation.

Transformation of the tourism industry remains a key challenge and although industry players have been proactive in tackling it, more work is still needed. TKZN will continue to play a key role in encouraging industry compliance with the government’s BEE Scorecard and provide advisory services to SMMEs to assist in their development.

In addition, TKZN will identify key service providers to assist in SMME mentorship and assistance. This will include facilitating direct access to markets.

To help accelerate the transformation of the provincial tourism sector, TKZN will:
11.5.1 *Provide advisory services to SMMEs and Community Tourism Organisations (CTOs)*

- Start-up advisory service to prospective and existing SMMEs and CTOs and monitoring of progress.
- Facilitate incubator and mentorship programmes.
- Enable business linkages to ensure sustainable SMME growth.
- Partnerships with, and mentorship of, communities that are entering the industry in order to unlock tourism potential within a specific community.

11.5.2 *Facilitate skills development*

- Assist in the identification of training interventions required to address knowledge and skills gaps within the emerging sector of the industry.
- Facilitate training and capacity building interventions for SMMEs.
- Facilitate SMME access to mainstream markets.

11.5.3 *Monitor and facilitate BEE Scorecard Compliance*

- Promote the business benefits of the Tourism BBBEE Scorecard through awareness workshops.
- Develop a BBBEE database to promote and monitor Tourism BBBEE Scorecard compliance.
- Conduct indepth analysis of tourism BBBEE compliance and prepare reports for advocating compliance.

11.5.4 *Proactively lobby with all relevant SMME support agencies to ensure that tourism is at the forefront of their financial assistance and support programmes.*

- Feasibility studies and business plan support for project promoters.
- Linkages with financial institutions and prospective investors (equity funders) for project promoters.

11.5.5 *Explore the viability of facilitating the creating of a business centre to as a gateway to knowledge, market access and mentoring support for BBBEE and SMME enterprises in KZN.*

- Shared business centre.
- Collective marketing initiatives and interventions for BBBEE enterprises.
- Platforms for access to market for BBBEE enterprises focusing on secondary source markets.

11.5.6 *Ensuring community focus*

- Address the community as a key stakeholder (focusing on awareness, involvement, guidance and beneficiation).
- Strategic emphasis on capacity building at the local level (including training programmes for local public officials).
- Focus on broadening diversity and participation in the tourism value chain in order to minimise leakages and improve the multiplier effect.

11.6 *Service Excellence*
TKZN also realises that TKZN’s source of competitive advantage lies in the people behind TKZN’s tourism products. Training and development, quality assurance and service delivery improvements will constitute a key thrust in the next five years as we strive to ensure a quality tourism experience for visitors to the province, which will promote incremental growth in visits.

This the organisation will do through:

11.6.1 Image Marketing and Perception Management

- Ensure a proactive Customer Care Programme.
- Continue with the Tourism Awareness Programme to position KZN as a welcoming and friendly destination.
- Enhance the Service Excellence Programme.
- Leverage media spend to gain extra media coverage.
- Maintain/manage a Public Relations and Media Relations Programme.
- Formulate a crisis communication plan as a key element of the overall communications plan for TKZN

11.6.2 Quality Assurance

- Monitor service standards through appropriate surveys, research and support to the department of Economic Development, Tourism and Environmental Affairs. It should be noted that the registration of the tourism service provider is the function of the Department of Economic Development and Tourism.
- Co-ordinate the customer care programmes to ensure guest satisfaction.
- To encourage awareness and promote the concept of access as integral to the achievement of service standards and grading criteria.
- Support and promote grading of tourism establishments in the province in conjunction with the Department of Economic Development and Tourism and the Tourism Grading Council of South Africa, Promote and support.

11.6.3 Work jointly with all stakeholders and key responsible partners to help ensure the health and safety of tourists

- Implement the Tourism Awareness Campaign.
- Encourage the establishment of an integrated approach on disaster management for the whole province.
- Raise tourism awareness, linking to economic benefits.

11.7 Research, Information and Knowledge Management

TKZN will ensure that the monitoring, evaluation and benchmarking indicators included in the TKZN strategy are internationally benchmarked and relevant. In addition to this information, the provision of relevant information to tourists and other key stakeholders and partners about the destination is of vital importance.

To achieve this TKZN will:

11.7.1 Undertake Relevant Research and effective Information and Knowledge Management
• Ensure leading edge market research availability for the domestic market.
• Provide comprehensive tourism information services to consumers, the trade as well as other stakeholders and partners.
• Initiate domestic tourism measurement to monitor performance against targets.
• Develop and enhance methodologies for measuring economic impact assessments and studies, particularly focusing on events and business tourism.
• Develop a sub-database, based on the current tourism asset data base, on accessible tourism services and attractions, to enable Information Offices to disseminate appropriate information to tourists with disabilities.
• Provide training to frontline staff on the information of accessible services and attitudinal training for appropriate customer care.
• Ensure marketing tools include specific reference to where information can be obtained on accessible tourism services and attractions, including the TKZN website, information offices, and the Accessible Tourism Forum.
• Implement appropriate indicators to measure the effectiveness and impacts of marketing initiatives such as advertising, public relations initiatives, media visitation programmes and events.

11.7.2 Identify and develop effective management of information and communication technology.
• Develop and implement an effective internal operations and communication system.
• Keep abreast with latest innovations in this area and ensure that TKZN remains at the cutting edge of Information and Communication Technology.

11.7.3 Build trust and credibility via information sharing
• Create platforms for information sharing between TKZN and trade partners, including BEE businesses and SMMEs and other provinces.

Develop and promote KZN as a business event tourism destination

• Business tourism event strategy activation.
• Work with and support the Durban KZN Convention Bureau Business event lead identification, qualification and bidding for such opportunities;
• Support for secured events including
• Provide delegate sourcing and boosting support to all convention venues.
• Implement the group tourism strategy for business tourism -events Meetings, Incentives, Conferences and Events Exhibitions (MICE).

To ensure optimal execution of this strategy, TKZN will be structured and managed within an environment with the necessary financial and administrative capacity, driven by a fully motivated team. TKZN will maintain a governance structure with specific targets, regularly monitoring progress towards achieving these targets.

Actions to be undertaken include:

11.8.1 Corporate Governance
- Continue development and implementation of operational policies and procedures.
- Maintain internal controls.
- Define and implement BEE policy.

11.8.2 Develop Human Resource systems to meet the strategic needs of the organisation

- Develop a training, recruitment and development plan to address skills and competency gaps within the organisation.
- Create a diversity management programme.
- Develop a performance management system that links directly with training and development, organisational performance and the reward system.
- Maintain and improve the Employee Assistance Programme (EAP) for employee wellness.
- Initiate leadership programmes to enhance organisational performance.

11.8.3 Manage financial constraints on delivery of strategy

- Continuously lobby for increased funding from the provincial government.
- Identification of alternative and complementary sources of funding.
- Analysis of international trends and best practice.

12. DEVELOPMENT AND PROMOTION OF THE PROVINCE AS A BUSINESS TOURISM DESTINATION THROUGH THE DURBAN KWAZULU-NATAL CONVENTION BUREAU

The province of KwaZulu-Natal through the Department of Economic Development and Tourism and in partnership with Ethekwini Municipality, has established the Durban KwaZulu-Natal Convention Bureau (CB). The department of Economic Development, Tourism and Environmental Affairs has subsequently ceded the governance oversight of the CB to the Board of Tourism KwaZulu-Natal. Therefore, a separate Board committee is being established in partnership with Ethekwini Municipality to fulfil the governance responsibility. The members of this committee shall include independent members appointed by Ethekwini Municipality.

TKZN shall work very closely with the Durban KZN Convention Bureau and support its marketing initiatives focusing on Business Tourism as well as marketing through events. These sectors of the tourism market have huge potential for increasing spend, improving seasonality and contributing to economic development.

Some of the key roles and functions of the CB are as follows:

- The identification, evaluation and qualification of business tourism bid opportunities;
- Bidding and bid support for qualified bid opportunities;
- Sourcing or value adds and support for bidding processes;
- Assisting with delegate boosting for secured business tourism events;
- Building awareness and relationships particularly amongst the association and government meetings planners;
- Maintaining accurate data sets.
South African Tourism has established a National Convention Bureau (NCB) as an entity within its structures. The CB is collaborating with the NCB on various initiatives and also in sourcing national bid support.

The CB has developed a detailed strategy focusing on business tourism as well as the market segmentation and promotional platforms.

The source marketing segmentation for the CB has been developed in line with the segmentation and targeting approach of the National convention Bureau. The targeted segments are as follows:

- Primary: association and government meetings.
- Secondary: Incentive and Corporate Meetings.
- Pioneering – exhibitions.

The implementation of this strategy shall be monitored through the CB and reviewed on an ongoing basis.

13. **BUDGET PLAN**

The KwaZulu-Natal Tourism Authority is a public entity listed in schedule 3C of the Public Finance Management Act, 1999 as amended. It is not allowed to budget for a surplus or deficit. It is accountable to the Department of Economic Development and Tourism and does not engage ordinarily in direct revenue generating activities. Therefore, all its funding is provided by the department of Economic Development, Tourism and Environmental Affairs through a grant allocation. Set out below is budget plan for the entity based on the Medium Term Expenditure Framework (MTEF) funding provided by the department of Economic Development, Tourism and Environmental Affairs.

The funding for the Durban KwaZulu-Natal Convention Bureau is provided directly by the department of Economic Development, Tourism and Environmental Affairs as well as Ethekwini Municipality. This is provided based on the current proportional shareholding of the Bureau. Therefore, the income and expenditure amounts for the Bureau are not included in the budget plan set out below.

<table>
<thead>
<tr>
<th>DETAILS</th>
<th>2014/15 (R’000)</th>
<th>2015/16 (R’000)</th>
<th>2016/17 (R’000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>INCOME</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provincial Government Grant</td>
<td>103 628</td>
<td>107 512</td>
<td>112 203</td>
</tr>
<tr>
<td>Other Income</td>
<td>37 253</td>
<td>38 589</td>
<td>39</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td><strong>140 881</strong></td>
<td><strong>146 101</strong></td>
<td><strong>151 203</strong></td>
</tr>
<tr>
<td>EXPENDITURE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A: Office of the CEO</td>
<td>8 194</td>
<td>8 478</td>
<td>8 642</td>
</tr>
<tr>
<td>B: Marketing</td>
<td>35 245</td>
<td>37 104</td>
<td>38 789</td>
</tr>
<tr>
<td>C: Tourism Information Services</td>
<td>15 147</td>
<td>15 672</td>
<td>15 977</td>
</tr>
<tr>
<td>D: Tourism Development</td>
<td>7 210</td>
<td>7 460</td>
<td>7 605</td>
</tr>
<tr>
<td>D: Corporate Services</td>
<td>17 241</td>
<td>18 241</td>
<td>17 650</td>
</tr>
</tbody>
</table>
### 13.1 Budget Allocations

In line with TKZN’s primary role, a very high proportion of the budget is allocated to the marketing department.

The proportion of allocation of resources between the support function and the line function is monitored on an ongoing basis. This ensures that there are sufficient resources for the implementation of the strategy as well as its associated programmes. Furthermore, people are one of the most important assets for the organisation, thus it will ensure it invests in its human resources by continuously developing its people and also rewarding for performance.

With regard to the tourism master plan, there is a need for a detailed financial needs analysis in order to ensure that the priority areas are resourced. In future, this shall be used as a broader tool for resource allocation whilst ensuring implementation of the plan.

### 14. RISK MANAGEMENT

It is critical that an environment conducive to tourism growth is created – which includes heightened and proactive action to create as safe and hazard free an environment as possible for visitors to the province. As per the requirement of the PFMA and the Treasury Regulations, the entity shall conduct annual risk assessment as well as associated action plans to mitigate such risks. Some of the risks identified are inherent to the sector and global in nature. Thus, the entity has no control over such risks other than monitoring and evaluation.

TKZN will champion a tourism risk management strategy for the province and will also be involved in the disaster recovery plan for the province. Added to this would be a need for a contingency planning and crisis management readiness during the planning period.

In addition, ongoing improvements in product and service standards will be imperative for the overall improvement of the environment in which tourism takes place.

The new King Shaka International Airport, which became operational in 2010, has daily flights direct from Dubai via Emirates Airlines into it. A great deal of work will continue to be done to secure more international airlines to fly directly into the province. TKZN endeavours to work with all its partners to facilitate this realisation. Consequently, the business environment in the province will be conducive to growing tourism demand.

### 15. Governance Structure
TKZN’s governance structure is designed to ensure that TKZN is aligned to provide its shareholders and the wider stakeholder body appropriate, efficient and effective implementation and where necessary review of the strategy.

TKZN will, through its most valued assets, its people, continuously resource itself both administratively and financially to contribute to making KZN a leading tourism destination.

The envisaged structure will be one that will continually ensure the following:

- That the organisation is best poised to deliver on the strategy.
- That legislative requirements are maintained to ensure best practice is followed in the organisation.
- Fair and equitable procurement policies and procedures.
- Fair and equitable employment and labour relations practices.

Furthermore, TKZN will ensure that it is appropriately structured to deliver on this strategy. To this end, there are 5 departments each with distinct but complementary objectives and responsibilities. These are:

<table>
<thead>
<tr>
<th>Department</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board</td>
<td>Board deliverables</td>
</tr>
<tr>
<td></td>
<td>• To ensure provision of effective corporate governance.</td>
</tr>
<tr>
<td>Office of the CEO</td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td></td>
</tr>
<tr>
<td>• To provide strategic direction and leadership to industry and the organization based on global outlook industry standards, national and provincial legislation, prescripts and guidelines and tourism sector intelligence.</td>
<td></td>
</tr>
<tr>
<td>• To ensure creation and maintenance of a positive image for TKZN and the provincial tourism brand.</td>
<td></td>
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<tr>
<td>• To ensure coordinated development and promotion of tourism among government stakeholders and private sector partners.</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Marketing</th>
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</thead>
<tbody>
<tr>
<td>• To increase destination brand awareness and positive association.</td>
</tr>
<tr>
<td>• To increase domestic and foreign tourist arrivals into the province.</td>
</tr>
<tr>
<td>• To penetrate the African region and other new markets.</td>
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</table>

<table>
<thead>
<tr>
<th>Public Relations and Communications</th>
</tr>
</thead>
<tbody>
<tr>
<td>• To build and maintain a positive destination and corporate brand image.</td>
</tr>
<tr>
<td>• To profile the destination through an international and domestic stakeholder hosting programme.</td>
</tr>
<tr>
<td>• To increase brand awareness and positive brand associations through event leveraging.</td>
</tr>
<tr>
<td>• To drive internal and external communication.</td>
</tr>
<tr>
<td>• To promote a tourist-friendly environment.</td>
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<table>
<thead>
<tr>
<th>Tourism Information Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>• To provide tourist information about the province</td>
</tr>
<tr>
<td>• To continuously measure the overall performance of the KZN tourism sector</td>
</tr>
<tr>
<td>• To maintain an information and knowledge management system and databases including the tourist service provider registration</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tourism Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>• To champion tourism development in order to position KZN as a globally competitive destination.</td>
</tr>
<tr>
<td>• To lobby for greater transformation of the tourism sector.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Convention Bureau</th>
</tr>
</thead>
<tbody>
<tr>
<td>• the identification, evaluation and qualification of business tourism bid opportunities;</td>
</tr>
<tr>
<td>• bidding and bid support for qualified bid opportunities. Sourcing or value adds and support for the bidding process;</td>
</tr>
<tr>
<td>• assisting with delegate boosting and sourcing other forms of support for secured business tourism events;</td>
</tr>
<tr>
<td>• building awareness and relationships particularly amongst the association and government meetings market of the nature and extent of the Durban and KwaZulu-Natal business tourism offering; and</td>
</tr>
<tr>
<td>• maintaining an accurate Durban and KZN data set, guide and</td>
</tr>
</tbody>
</table>
associated website of business tourism venues and services. Using this resource to develop support partnerships for the CB and ultimately membership contributions to the operations of this entity.

| Corporate Services | • To provide enabling environment which ensures that the skills, knowledge and attributes of employees are applied to realise maximum benefits  
• To provide reliable support service to assist the various departments within TKZN in carrying our their strategic objectives and effective implementation of the strategy  
• To oversee statutory and regulatory compliance including financial management  
• To ensure that the TKZN’s activities are in line with the strategy |
APPENDIX A

TOURISM MACRO GOALS, INDICATORS AND TARGETS FOR KWAZUU-NATAL PROVINCE

Introduction

The measurement of the tourism economy is done through a Tourism Satellite Account (TSA). The TSA is a measurement framework, based on the concepts, definitions and classification of the System of National Accounts (SNA) developed to provide a credible measure of the economic contribution of the tourism sector. Basically, the TSA identifies tourism characteristics industries, i.e. those which would disappear or be substantially reduced if tourism did not exist. The TSA identifies the total output, costs, value added and employment of those industries, similar to what is provided for all industries in the core SNA.

The measurement of the tourism economy is done utilising indicators adopted by various tourism organisation or entities. These tend to vary mainly between the United Nations World Tourism Organisation (UNWTO) and the World Travel and Tourism Council (WTTC). The different indicators used by these two organisation are set out below:

The UNWTO measures tourism using the following indicators:
- Arrivals – purpose of visit, mode of transport;
- Receipts; and
- Expenditure in outbound markets.

The WTTC measures tourism using the following indicators:
- GDP to the world economy - direct and total;
- Employment – direct and total;
- Visitor exports; and
- Investment.

Within South Africa, the National Tourism Sector Strategy (NTSS) developed by the National Department of Tourism (NDT), has adopted the following indicators:
- Arrivals;
- Spend;
- Length of stay;
- GDP contribution;
- Purpose of visit;
- Increase domestic tourists;
- Job creation;
- Geographical spread;
- Seasonality

At a provincial level, the KwaZulu-Natal Tourism Master Plan has adopted the following sets of indicators to measure the performance and growth of the tourism sector:
- GGP contribution (Provincial GDP)
- International arrivals
- Domestic trips
- Employment (Direct and Indirect)
- Geographic Spread

Definitions of the indicators
**Foreign Tourist arrivals:** This is as per the foreign tourist definition of the UNWTO. The Department of Home Affairs and Statistics South Africa have worked together over the past few years worked together align the datasets in line with the UNWTO definitions.

**Foreign Spend** - the amount spent by foreign tourists on his/her entire trip including amounts spent in his/her home country and during his/her trip and stay at the destination. It is calculated by adding all prepaid expenses (including airfare) and expenses incurred in South Africa.

**Domestic Trip:** In line with global definitions a domestic trip is defined as all those trips taken within the borders of South Africa by an adult resident in South Africa. For such a trip to be considered a domestic tourism trip, the trip must have:

- Been to a destination more than 40kms from the respondent’s home (one way)
- Lasted one night but less than 365 nights
- Not been for relocation purposes
- Not been part of the respondent’s regular commuting (unless it was for leisure or recreational purposes)
- Not result in the respondent receiving payment in the place visited for services rendered or goods delivered in the place visited.

**Domestic Spend:** The domestic spend is calculated by adding the per capita spend for each trip taken in the period and reported in nominal terms, unless otherwise stated. This is determined utilising the Tourism Satellite Account measurement framework.

**Direct and Total Contribution to GDP and GGP:** Tourism’s contribution to a country’s GDP or the GGP is calculated utilising the Tourism Satellite Account measurement framework.

**Employment:** Tourism employment is a measure of the number of jobs in tourism and non-tourism but related industries as per the Tourism Satellite Account measurement framework.

**Sources of information for Indicators**

*Domestic Trips and Spend:* Stats SA and South Africa Tourism quarterly survey.

*Foreign Tourist arrivals:* Statistics South Africa and South African Tourism departure surveys.

*Foreign Tourist Spend:* Statistics South Africa and South Africa Tourism departure surveys.

*Contribution to GGP:* Statistics South Africa, South Africa Tourism and Provincial Treasury, TKZN Analysis.

*Total and direct employment:* Statistics South Africa, South Africa Tourism and Provincial Treasury, TKZN Analysis.

*Geographic Spread:* South Africa Tourism departure surveys and trend analysis.

**Macro Goals and Targets**
Given the abovementioned background, the Province of KwaZulu-Natal has developed its tourism macro goals and targets which were based on the targets set in the National Tourism Sector Strategy. Through this strategy, Tourism KwaZulu-Natal aims to contribute directly towards the achievement of these targets. Micro organizational targets shall be formulated as part of the Strategy Implementation plan and particularly its Annual Action Plan for the respective year of the planning period.

The targets have been set as follows:

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Domestic Trips (m)</td>
<td>7,1</td>
<td>6,2</td>
<td>8,7*</td>
<td>8,8</td>
<td>8,9</td>
<td>8,9</td>
<td>▼</td>
</tr>
<tr>
<td>Foreign Tourists</td>
<td>908 277</td>
<td>891 822</td>
<td>1 001 374*</td>
<td>1 051 442</td>
<td>1 129 609</td>
<td>1 186 089</td>
<td>▼</td>
</tr>
<tr>
<td><strong>Domestic spend per person per trip</strong></td>
<td>R670</td>
<td>R766</td>
<td>R738*</td>
<td>R775</td>
<td>R814</td>
<td>R855</td>
<td>▲</td>
</tr>
<tr>
<td>Foreign spend per person per trip</td>
<td>R7 215</td>
<td>R7 517</td>
<td>R7 953*</td>
<td>R8 350</td>
<td>R8 767</td>
<td>R9 325</td>
<td>▲</td>
</tr>
<tr>
<td>Direct Contribution to GGP (bn)</td>
<td>R22</td>
<td>R20</td>
<td>R31,7*</td>
<td>R33,4</td>
<td>R35,2</td>
<td>R36,9</td>
<td>▲</td>
</tr>
<tr>
<td>Total Contribution to GGP (bn)</td>
<td>R32</td>
<td>R28</td>
<td>R45,6*</td>
<td>R48</td>
<td>R50,6</td>
<td>R53,1</td>
<td>▲</td>
</tr>
<tr>
<td>Direct Employment</td>
<td>128 547</td>
<td>107 177</td>
<td>133 524*</td>
<td>137 653</td>
<td>141 910</td>
<td></td>
<td>▲</td>
</tr>
<tr>
<td>Geographic spread (foreign)</td>
<td>1,3</td>
<td>1,3</td>
<td>1,3*</td>
<td>1,3</td>
<td>1,3</td>
<td>1,3</td>
<td>▲</td>
</tr>
<tr>
<td>KZN hotel occupancy</td>
<td>58,3%</td>
<td>60,8%</td>
<td>64,8%</td>
<td>64,0%</td>
<td>65,0%</td>
<td>6,05%</td>
<td>▲</td>
</tr>
<tr>
<td>Air passenger movements</td>
<td>6,0%</td>
<td>-5,9%</td>
<td>-5,1%</td>
<td>4,0%</td>
<td>5,0%</td>
<td>5,0%</td>
<td>▼</td>
</tr>
<tr>
<td>Road traffic arrivals</td>
<td>-1,3%</td>
<td>11%</td>
<td>-6,3%</td>
<td>5,0%</td>
<td>7,0%</td>
<td>7,0%</td>
<td>▼</td>
</tr>
</tbody>
</table>

* = Estimated; T = Trend

Disclaimer and assumptions for targets
- Figures assume SAT, UNWTO and WTTC projections are reasonable
- TKZN has negligible control over the number of foreign arrivals, foreign spend or foreign geographic spread
- 2009 was used as the original base year as this was the year in which SAT changed their methodology to be more in line with global standards and reported only tourists. Day visitors were no longer included in the total.
- 2010 was used as the baseline for domestic trips
- A 1% increase was applied to domestic trips, based on historical increases from 2006
- A 5% increase was applied to foreign arrivals based on historical increases from 2006
- A 5% increase was applied to domestic and foreign spend per person per trip, based on historical increases from 2006
- A 5% increase was applied to GGP growth, based on historical growth rates from 2006
- The global economic situation remains stable
- Note that the 2015 targets are as per the KZN Tourism Master Plan