TOURISM STRATEGY

2003-2006

“Beyond your expectations”
# PURPOSE OF THIS STRATEGIC PLAN DOCUMENT

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## OUR MISSION

## OUR GUIDING PRINCIPLES AND VALUES

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### Our Brand

### Our Partners

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'Tourism Strategy 2003' maps out Tourism KwaZulu-Natal’s (TKZN’s) approach to positioning KwaZulu-Natal as a globally competitive tourist destination and to growing the provincial tourism economy and employment opportunities between 2003 and 2006.

The strategy draws on general frameworks for co-operative governance, and aims to align tourism institutions, avoid duplication, reduce costs and provide a focal point for coordination.

The strategy represents TKZN’s commitment to the people of KwaZulu-Natal to play a leading role in the growth of tourism in our Province. It aims to clarify the organisation’s vision and purpose, and set goals and targets so that our partners in the tourism industry, and the public, can both measure our performance and find ways of joining us in this most exciting endeavour.
OUR VISION

For the Province of KwaZulu-Natal to be recognised nationally and internationally as Africa's premier tourism destination.

OUR MISSION

To initiate, facilitate, co-ordinate and implement strategic tourism marketing and product development programmes that provide an enabling framework within which regional, provincial and private sector stakeholders can achieve their goals to the benefit of the Province.
OUR GUIDING PRINCIPLES & VALUES

We will empower our staff by...
Defining latitude for action, providing guidance, ensuring follow-up, encouraging independent action and motivating staff to go above and beyond their job requirements.

We will have a customer focus by...
Seeking to understand our customers, educating our customers, building collaborative relationships, taking action to meet customer needs and concerns and by implementing a customer feedback system.

We will align our performance for success by...
Setting performance goals to a standard of excellence, establishing staff competencies and development plans, encouraging staff to take responsibility for tracking their own performance and by holding regular performance evaluations with staff and internal customers.

We will be innovative by...
Keeping up to date with key trends and developments, challenging paradigms, leveraging resources, thinking expansively, ensuring relevance and implementing improvements and solutions.

We will build trust within the organization by...
Operating with integrity, disclosing our thoughts, feelings and rationale, remaining open to ideas and demonstrating honesty.
TKZN will strive:

To contribute to sustainable GDP growth, job creation, redistribution and transformation within KwaZulu-Natal through:

- Increasing tourist volumes;
- Increasing tourist spend;
- Increasing length of stay of visitors;
- Improving the geographic spread of visitors;
- Improving seasonality patterns.

To manage a strategic marketing framework within which the provincial tourism marketing effort will be co-ordinated, funded and driven;

To manage an international marketing strategy, specifically aimed at positioning KwaZulu-Natal favourably within selected international tourism markets;

To manage a domestic tourism marketing strategy aimed at capitalising on the province’s already dominant position and at attracting a greater market share of domestic tourism from visitors outside of the Province;

To manage the implementation of a dynamic tourism product development strategy which aims to improve product, broaden ownership, and promote black economic empowerment through small business development and community-based tourism initiatives within the overall theme and branding of the Province;

To implement provincial and national tourism policy in a participatory manner, together with its partners, through the development of an annual action plan, and the establishment of effective external communications systems.

To utilise resources in a responsible and sustainable manner and establish and sustain a lean, efficient and empowered corporation.

Finally, as our most important resource, we will empower and reward our staff to play a central role in achieving these objectives.
CORE GOALS & TARGETS

MACRO GOALS & TARGETS

TKZN will measure the extent it is able to achieve core macro goals and targets in the following areas:

- GGP growth, job creation;
- Redistribution and transformation;
- Increasing tourist volumes;
- Increasing tourist spend;
- Increasing length of stay of visitors;
- Improving the geographic spread of visitors;
- Improving seasonality patterns.

<table>
<thead>
<tr>
<th>MEASURE</th>
<th>GOALS &amp; TARGETS</th>
</tr>
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<tbody>
<tr>
<td>Growth in domestic urban tourist arrivals</td>
<td>From 8.1mn in 2003 to at least 8.5mn in 2006.</td>
</tr>
<tr>
<td>Growth in foreign tourism arrivals*</td>
<td>From 520 000 in 2003 to 620 000 in 2006</td>
</tr>
<tr>
<td>Growth in direct tourism spending</td>
<td>From R9 bn in 2003 to R12 bn in 2006</td>
</tr>
<tr>
<td>Total impact on GGP</td>
<td>From R13 bn in 2003 to R17 bn in 2006</td>
</tr>
<tr>
<td>Growth in average length of stay</td>
<td>To increase the stay of the majority of foreign tourists from 6 nights to 6.5 nights by 2006 and the stay of domestic tourists from 6 nights in 2003 to 7 nights in 2006.</td>
</tr>
<tr>
<td>Increase in the percentage of tourists indicating that their decision to visit KZN was influenced by marketing media</td>
<td>Domestic tourists increasing the proportion by 0.5% per annum. Foreign tourists increasing the proportion by 1% per annum.</td>
</tr>
<tr>
<td>Improving the geographic spread of visitors</td>
<td>Increasing the proportion of domestic tourists that visit non-coastal regions by 0.25% per annum. Increasing the proportion of foreign* tourists that visited regions other than Zululand and Durban by 0.25% per annum.</td>
</tr>
<tr>
<td>Improving seasonality patterns</td>
<td>Attempting to increase the proportion of urban adult domestic tourists that visit in off-season periods by 0.25% per annum. Attempting to increase the proportion of foreign tourists that visit in off-season periods by 0.5% per annum.</td>
</tr>
<tr>
<td>Small business support</td>
<td>Ensuring that procurement policies and practices of TKZN facilitate access to at least 80% of all funds procured from the organisation by HDI and small businesses by the year 2006.</td>
</tr>
<tr>
<td>Community-based tourism</td>
<td>To assist in facilitating the development of at least 12 sustainable community-based tourism products within the province by 2006.</td>
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*Who arrived in South Africa by air.

MICRO TARGETS

Micro targets are additional targets against which the performance of TKZN will be measured. More detailed targets will be set in annual action plans.
### Consumer Response

<table>
<thead>
<tr>
<th>MEASURE</th>
<th>GOALS &amp; TARGETS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand recognition</td>
<td>Foreign - from 20% in 2002 to at least 33% in 2006. Domestic - from 40.5% of urban adults in 2000 to at least 50% urban adults in 2006.</td>
</tr>
<tr>
<td>Use of web site</td>
<td>To increase the hit rate and user rate of the TKZN web site by at least 25% per annum to the year 2006.</td>
</tr>
<tr>
<td>Email, telephonic, postal, fax enquiries and walk-in enquiries</td>
<td>To increase the rate of walk-in enquiries to TKZN’s main office by at least 10% per annum. To grow the number of email enquiries by which TKZN’s information service deals with on an annual basis by 25% per annum. To increase the number of telephonic and fax enquiries that TKZN deals with on an annual basis by 20%.</td>
</tr>
<tr>
<td>Brochure distribution</td>
<td>To ensure that all SA Tourism Offices and SA Embassies in KZN’s key markets are constantly stocked according to a distribution plan and stock control system.</td>
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</table>

### Trade Response

<table>
<thead>
<tr>
<th>MEASURE</th>
<th>GOALS &amp; TARGETS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recognition of slogan</td>
<td>To increase local trade awareness of slogan from 89% in 2002 to 95% in 2006</td>
</tr>
<tr>
<td>Awareness of campaigns</td>
<td>To increase local trade awareness of TKZN campaigns from 87% in 2002 to 92% in 2006</td>
</tr>
<tr>
<td>Perceptions of performance</td>
<td>To increase the 46% of local trade who stated that TKZN is performing above average or significantly above average with respect to similar organisations in 2002 to 60% in 2006</td>
</tr>
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</table>

### Product Development

<table>
<thead>
<tr>
<th>MEASURE</th>
<th>GOALS &amp; TARGETS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructural Development</td>
<td>To leverage at least R25 million funding (in addition to the provincial allocation) for tourism infrastructural development throughout the Province per annum.</td>
</tr>
<tr>
<td>Investment Promotion</td>
<td>In partnership with private and public sector partners, to assist in facilitating private sector investment in at least 3 tourism projects per annum.</td>
</tr>
<tr>
<td>Small Business Support</td>
<td>Support at least 20 SMME’s per annum to enable them to attend Indaba and other international and domestic tourism trade and consumer shows.</td>
</tr>
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</table>

### Corporate Governance

<table>
<thead>
<tr>
<th>MEASURE</th>
<th>GOALS &amp; TARGETS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remuneration and related costs</td>
<td>Finalisation and signing of performance contracts within one month of employment and one month of each new financial year. Completion of mid-year performance reviews by 15th of October. Completion of Final Annual Performance reviews by the 15th of April.</td>
</tr>
</tbody>
</table>
**CORE GOALS & TARGETS**

These figures are based on the following assumptions:

- That TKZN budget influences 25% of KZN’s domestic and 7% of its foreign tourists whose decision to visit was influenced by marketing media. These tourists are expected to spend at least R168mn in the Province in 2002 and R182mn in 2003. Research has revealed that the economic multiplier for tourism in KZN is in the order of 1.42, which implies that the total impact of this spend will be in the order of R280mn in the 2003/2004 financial year and R343mn in 2005/2006 financial year.

- The employment multiplier for tourism is estimated to be 13.7 jobs for every R1mn of direct tourism expenditure in 2003 and 11.01 jobs in 2006.

TKZN's Macro and Micro targets are based on the following broad assumptions regarding the South African & KZN tourism environment:

- Safety & security situation improves;
- A stabilisation in the perceived health threats to travel in KZN;
- Economy remains stable and continues to grow;
- Effective international and domestic marketing;
- Adequate public & private sector contributions;
- Perception of KZN as a value for money destination is maintained.

<table>
<thead>
<tr>
<th>HR Development and Training</th>
<th>Achievement of targets set in an annual staff training and development program.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational costs</td>
<td>Ensuring that costs related to human resources and administration constitute no more than 25% of annual provincial budgetary allocations.</td>
</tr>
<tr>
<td>Customer Care</td>
<td>Achievement of a maximum of two working day response period for any internal or external communication.</td>
</tr>
<tr>
<td>Risk management and Internal controls</td>
<td>Achievement of at least two internal audits per year and ensuring of compliance to these audits within the specified time periods.</td>
</tr>
<tr>
<td>Treasury Regulations and Statutory Requirements</td>
<td>Timeous submission of reports in compliance with treasury and other regulations. Monthly reporting to the Department on the Conditional grant. Quarterly reporting on the annual grant by: 1st Quarter June 30 2nd Quarter September 30 3rd Quarter December 31 4th Quarter March 31 Submission of Audited AFS and the Annual Report to the Executive Authority, for presentation to the Provincial Legislature by August of each year. Monthly Reporting to other Donor Agencies, for Product Development Projects, by the 10th of each month.</td>
</tr>
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<tr>
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<tbody>
<tr>
<td>Budget</td>
<td>R45mn</td>
<td>R51mn</td>
<td>R57mn</td>
</tr>
<tr>
<td>Direct Expenditure</td>
<td>R197mn</td>
<td>R218mn</td>
<td>R242mn</td>
</tr>
<tr>
<td>Impact on GGP</td>
<td>R280mn</td>
<td>R309mn</td>
<td>R343mn</td>
</tr>
<tr>
<td>Total impact on employment - sustained jobs</td>
<td>2 705</td>
<td>2 772</td>
<td>2 862</td>
</tr>
</tbody>
</table>

*These figures are based on the following assumptions:

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The employment multiplier for tourism is estimated to be 13.7 jobs for every R1mn of direct tourism expenditure in 2003 and 11.01 jobs in 2006.
STRATEGIC FRAMEWORK

TKZN operates within the parameters of a strategic framework which aims to assist the organization, its stakeholders and partners to make strategic choices to realize the objectives set out above. In addition, the framework aims to provide coherence and certainty for provincial tourism marketing initiatives and programmes.

There are four key elements to the framework:
• Our approach;
• Our brand;
• Our partners;
• Our people.

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.

Understand the market
Choose the attractive segments
Market the destination

Facilitate the removal of obstacles
Facilitate the product platform
Monitor and learn from tourist

In short, this outlines the way in which the organization takes its strategic decisions.

Firstly, through the continuous collection of data, facilitation of market research, and constant monitoring of industry and consumer trends. The organization aims to understand the market.

Secondly, the analysis of the market and consumer trends enables the organization to make choices, not only around in which markets it wishes to serve, but also in terms of the types of marketing campaigns it needs to pursue.

Thirdly, through the development of marketing campaigns and programmes, TKZN markets to the trade internationally, and consumers domestically, and enters into partnerships in order to realize its objectives.

Fourthly, we will intervene in order to make the arrival and movement of people easier through attempting to remove those obstacles which hinder tourist arrivals domestically and internationally.

Fifthly, on the back of research and consumer responses, as well as on the need to fulfil our objectives for transformation within the industry, we will facilitate the development of new products behind the branding and strategy of the Province.

Finally, we will continuously monitor the effectiveness of our programmes and activities, and monitor consumer growth, trends and patterns of decision-making to improve our marketing efforts.

OUR BRAND

TKZN will continue to develop the various legs of its brand name “The Zulu Kingdom” through a dedicated brand strategy and translate this through into the organizations operations, behaviour, marketing collateral, advertising and promotion campaigns.
TKZN will actively manage and monitor the development of the brand in four core areas: Corporate, Retail (Zulu Legends), Eventing and Destination branding. The brand essence “beyond your expectations” will permeate the organisational behaviour of TKZN, tourist experiences and the marketing efforts of the organisation.

**Beyond your expectation**

![Zulu Kingdom Brand Logo](image)

**Corporate**
- Service Excellence
- Whenever you interact with TKZN, the service given goes beyond your expectations

**Destination**
- Tourist Experience
- Whatever type of holiday you choose in KZN it goes beyond your expectations

**Retail**
- Consumer Experience
- Whenever you enter a Zulu Legends Outlet it goes beyond your expectations

**Event**
- Participant Experience
- Whenever you go to attend a TKZN event it goes beyond your expectations

**Destination marketing strategy**

The brand strategy will, in particular, focus upon a destination marketing campaign, which aims to highlight eight key destinations within the Zulu Kingdom.

In co-operation with private and public sector partners, TKZN will work to establish these destinations behind strong and consistent icons. Care will be taken to ensure that regions are promoted within the framework of these destinations.
An outline of the broad brand architecture for destination marketing and branding is set out diagrammatically below:

**Brand Architecture**

```
Corporate    Destination    Retail    Event

Cultural Heritage    Mountains/Scenery    Sun/Sea/Beach    Wildlife
Battlefields    uKhahlamba Drakensberg Park
Emakhosini
Durban    Midlands

Greater St Lucia Wetland Park and Surrounds
```

**Brand alignment and synergy**

TKZN will however play a lead role with the Department of Economic Development and Tourism, and Public Entities which fall under the department, to align its branding within a common framework for the Province. From a tourism and investment promotion perspective, every effort will also be made to ensure that this brand revision will also compliment national branding initiatives being undertaken by the International Marketing Council and SA Tourism. TKZN will work in establishing brand synergy with strong private sector brands which can help in growing tourist arrivals into the Province.

**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 co-ordinate 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 the Department of Economic Development and Tourism;
- The National Department of Environmental Affairs and Tourism and SA Tourism;
- Other national and provincial government departments and public sector public entities;
• Private sector operators and registered service providers within the tourism industry within KwaZulu-Natal;
• The private sector tourism industry more broadly;
• Our suppliers and partners which assist TKZN in the delivery of our core services;
• SA Embassies in core international markets;
• Local government and locally based tourism promotional institutions.

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 industry, 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.

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 prioritise its communication efforts with the people of KwaZulu-Natal to ensure that they are kept abreast of tourism developments and act as ambassadors for the promotional efforts of TKZN.
MARKET RESEARCH, INFORMATION & DATABASE MANAGEMENT

TKZN will continue to develop, manage and maintain a dynamic, relevant and accessible tourism information management system (database) and research programme for the province. The system will be linked to national and global systems, providing information on trends, developments, competitive information tourism products and market intelligence. The system will also be linked regionally and locally and KwaZulu-Natal stakeholders will be able to use this data in their planning and decision-making. The registration system will be implemented in order to assist in ensuring that the database is effectively maintained and accurate. The registration system will also be more firmly linked to national grading processes to encourage high levels of service excellence within the industry.

TOURISM INFORMATION SERVICES

TKZN will aim to provide a comprehensive information service to both the consumer and trade. This will be through the establishment of information offices at key gateway entry points into the Province, information provision at airports, and partnerships with local Community Tourism Organisations (CTO’s). Internationally this will be maintained through linkages with SA Tourism and SA Government Offices in key markets, and attendance of international trade and consumer shows. Fax-on-demand, the Website and Telitourist programme will act as key mechanisms for the distribution of tourism information in addition to the publication of research reports and occasional papers highlighting key trends. Selective use of the media will be utilised to ensure that tourism information is disseminated to as wide an audience as possible.

IMAGE MARKETING & PERCEPTION MANAGEMENT

Over the past five years, great strides have been made by provincial government to reduce the incidence of political strife and to improve the Province’s image as a peaceful, stable and attractive destination. However, and in spite of the realities of these efforts, the province still retains a negative image in key markets both domestically and internationally.

TKZN will implement a major national image marketing campaign that will focus on dealing with the perceptions and realities of safety, security and crime, and profiling the importance of tourism. The campaign will also be pursued internationally on a more limited scale.

In addition, the organisation will continue to develop its province wide customer care programme whilst constantly challenging partners to monitor the performance of TKZN itself.

MEDIA LEVERAGE

A central thrust of TKZN’s marketing strategy will be to pursue creative relationships with the electronic and print media domestically and internationally to augment marketing communications expenditure. These relationships will be pursued to stretch the value of TKZN’s marketing spend. Media educational, the use of documentaries and magazine programmes in the electronic media, feature articles in the print media, regular newss releases and an active public relations programme will aim to ensure that KwaZulu-Natal, individual tourism products and attractions, and TKZN receive more regular exposure in both the domestic and international media.

TOURISM AWARENESS

Well-planned and regular tourism awareness programmes, in close cooperation with national, district and local tourism partners, will be
fundamental to improving service standards and developing a tourist friendly culture with the Province. TKZN will encourage district and local councils to play a leading role in promoting tourism awareness.

PROVIDING PLATFORMS ON PROMOTIONAL MATERIALS

TKZN’s approach to profiling the various attractions, destinations and products of the province is to provide a platform for their participation in the different marketing activities and promotional materials produced by the institution. The organization will however only provide a platform for those products and service providers, which are officially registered with TKZN. On an annual basis the organization will release information on the various opportunities available for collaboration in the forthcoming year.

ADVERTISING

TKZN’s approach to advertising will be to reinforce the key strategic elements outlined in the strategy. The primary focus of advertising will be domestic, with an identification of key publications, radio stations and outdoor advertising opportunities on an annual basis so as to establish a consistent market presence through those media which are able to reach our target market.

TRADE MARKETING

Internationally, trade marketing will involve the hosting of familiarisation trips and educational visits for travel buyers, the effective distribution of literature and promotional material to industry decision-makers, consistently updating information on prices, packages, events and special and new attractions. In addition TKZN will aim to provide a platform for the KZN based trade to gain greater exposure to international wholesalers and retailers through pursuing co-operative marketing deals. TKZN will pursue relationships with those SA based tour operators and companies who are active internationally with a view to keeping them informed of developments within the Province.

Domestically, TKZN will play a more active role in co-operating with local industry players to better package locally based opportunities and events so that they are more affordable and accessible to the domestic market. This will entail working and planning with the South African industry to deliver quality packages to the consumer through marketing support and co-operative marketing arrangements.

MEETINGS, INCENTIVES, CONFERENCES & EXHIBITIONS

TKZN’s role in this area will be around generically profiling the attributes of the province in order to attract meetings, incentives, conferences and exhibitions.

TKZN will work specifically with industry stakeholders to facilitate a more direct role in the incentive industry by raising awareness of the product requirements of this industry and network with companies which are active in this niche sector.

In co-operation with other tourism stakeholders and the private sector, TKZN will communicate with delegates attending international conferences and exhibitions in Durban and elsewhere in the Province. This programme is aimed at enhancing the delegates’ tourism experience, extending the duration of their stay in the province and at encouraging return visits and word-of-mouth recommendations for KwaZulu-Natal.
EVENTS

TKZN will market events within the Province which attract visitors from other provinces and countries. The role of TKZN will be to try and ensure the events are well attended, that participants or spectators extend their length of stay in the province, and that consumers have easy access to the channels for gaining access to the province and events during this period. In addition, key cultural and sporting events will be identified for support and development, and to leverage exposure for the “Zulu Kingdom” branding.

TRADE & CONSUMER SHOWS AND WORKSHOPS

Trade and consumer shows, and trade workshops remain an important and integral part of the marketing efforts of TKZN. Internationally the choice and selection of participation in these events will be driven by the core markets targeted and will be in line with the programmes initiated by SA Tourism.

Domestically, a greater focus will be placed on consumer as opposed to trade shows in our core markets.

In addition, however, TKZN will facilitate domestic workshops with inbound tour operators to expose them to KZN based product and activities.

RETAIL AND MERCHANDISING

Through the ownership of the trade marks of “Zulu Legends” TKZN will continue aggressively to pursue a merchandising programme behind its brand. Whilst this initiative is primarily private sector driven, TKZN will continue to fulfill its contractual obligations and provide relevant merchandise into this store. In addition to this relationship with Zulu Legends, TKZN will continue to produce general merchandise and promotional items, which help in profiling and positioning the Zulu Kingdom.
MARKET FOCUS AREAS

TKZN’s international marketing strategy will be closely aligned behind the marketing efforts of SA Tourism who has the primary responsibility for marketing South Africa internationally.

To this extent TKZN will ensure that its marketing efforts are focused upon the core markets and market segments identified by SA Tourism. The organization will aim to gain maximum leverage for the Province in these core markets.

Due to the fact that SA Tourism has chosen not to market in certain core countries with which KwaZulu-Natal has developed a relationship and established partnerships and secured arrivals, the organization will contribute resources into these markets.

TKZN will focus its international marketing efforts in the core segments in the United Kingdom and Germany.

TKZN will, however, continue to maintain a presence by working with partner organizations and SA Embassies in all other important markets including:

- United States;
- Belgium;
- Italy;
- France;
- Netherlands;
- Middle East.

It will work with SA Tourism to penetrate the Chinese market in order to attempt to ensure a significant flow of arrivals from this new market.

TKZN will work with SA Tourism in focusing its efforts on the African market, especially promoting arrivals from Southern Africa, as well new markets outside of the Southern African region. It will investigate opportunities in North, West and East African states and the Province of KwaZulu-Natal.

TKZN will continue to investigate ways of securing arrivals from the Russian, and East European markets especially from Hungary to act as a possible hub into Durban International Airport.

INDABA

TKZN will continue to use Indaba as a key focal point in its international marketing efforts. Together with SA Tourism it will aim to make Indaba one of the top three travel and tourism trade shows in the world.

The organization will also aim to leverage maximum impact off the event to ensure that international and national delegates leave with a positive impression of the destination.

AIRPORT ARRIVAL, CRUISE TOURISM & ACCESS

Tourism KwaZulu-Natal will pursue an aggressive strategy to secure air arrivals through Durban International Airport by means of a focused charter and aviation strategy.

In partnership with relevant partner institutions, Tourism KwaZulu-Natal will pursue a strategy to increase arrivals through:

- Pursuing charter flights from new or existing core markets;
- Supporting marketing efforts which secure traffic from key international air entry points in the country (JIA and CIA);
- Continuing to pursue the arrival of international scheduled flights through Durban International Airport.

In addition, TKZN will pursue opportunities within the cruise tourism industry, by investigating opportunities on the East Coast of Africa, and improving services at Durban and Richards Bay Harbours.
DOMESTIC MARKETING STRATEGY

KwaZulu-Natal remains South Africa’s most important domestic tourism destination in terms of the value of tourist spend. TKZN will aim to defend this position within the next three-year period. At the same time it will aim to increase market share in specific market segments which will improve tourist spend.

EFFECTIVE MARKET SEGMENTATION

Whilst a great deal is understood about KwaZulu-Natal’s domestic tourist market and the importance of specific provinces in arrivals, there is a need to refine this understanding.

In order to achieve this objective TKZN will undertake and sustain a market segmentation analysis to analyse the potential and attractiveness of various market segments for the KwaZulu-Natal on the one hand, and the extent to which they have been visiting the region on the other.

This segmentation analysis will enable TKZN to develop focused and direct marketing campaigns to specifically target these attractive market segments.

Until complete, TKZN will continue to focus its efforts on Cape Town and Johannesburg as core source markets and key entry points into the country.

ALL YEAR ROUND ADVERTISING PRESENCE

In addition to specific direct marketing campaigns TKZN will continue to ensure that the Province, and its destinations are generically profiled in its key source markets. This all year round presence will be electronically based on radio, whilst also selecting key print and outdoor opportunities which reach our target markets.

PROMOTIONAL CAMPAIGNS

The all year round presence will be supplemented with promotional campaigns during key periods of the year. These promotional campaigns will aim to deal with domestic seasonality patterns on the one hand, whilst ensuring that the Province continues to receive its market share during key events and traditional tourist seasons.

INTERNAL MARKETING FRAMEWORK

The internal market, in other words, KwaZulu-Natalians, are the greatest supporters of tourism within the Province. Not only do they make the most tourist trips, but also their support and knowledge of the tourist product within the Province is critical for promotion. Word-of-mouth promotion remains the single most important marketing mechanism within a domestic tourism-marketing framework.

Whilst TKZN sees the primary role of internal marketing within the province as being a function of local government, it will work with local government to set up an effective internal marketing framework which will focus, inter alia, on tourism awareness programmes, service excellence, welcoming tourists and encouraging people to travel within their own province.

“Experience the tranquillity and solitude of glistening rivers and little brooks amongst valleys and rolling mountains. Nothing but the best fly fishing, micro-lighting, rock climbing, canoeing and hiking”
STRATEGIC FRAMEWORK

The success of the province’s Tourism Strategy rests on ensuring that the people of KwaZulu-Natal are able to derive direct benefits from the growth of the industry. In addition to providing support to small emerging businesses within the industry, TKZN recognizes that the development of new attractions, products and events are key mechanisms in providing opportunities for disadvantaged communities.

Although TKZN is not an investment organisation and does not view its role as investing in, owning or managing tourism products, it does consider the facilitation of new and appropriate tourism products as a crucial responsibility, and as being wholly interrelated to its marketing activities.

Its objectives in this regard include:
• Broadening ownership in the industry, particularly amongst the previously disenfranchised sectors;
• Complimenting and improving the existing tourism product mix;
• Giving support to the strategic marketing framework and brands;
• Facilitating new investment/funding in areas of low economic activity; and
• The facilitation of new tourism infrastructure.

Product development is viewed as a means of stimulating new in-bound investment into the tourism economy, growing small businesses and assisting in the process of creating sustainable jobs.

At the same time, the success of an effective Tourism Product Development Strategy lies in a unique marketing strategy. Unlike classic product marketing criteria, when the product is developed first followed by the marketing strategy, this report has instead been determined as a consequence of marketing imperatives.

The ‘Zulu Kingdom’ brand has been adopted for both the domestic and international markets. Historically, it is the needs of the domestic market that have created the existing tourism product, which by and large is devoid of direct ‘Zulu Kingdom’ attributes.

In the absence of associated product and infrastructural offerings, the Zulu Kingdom brand lacks substance. The existing infrastructure and rather tired product, is in response to the needs of domestic holiday tourists and not those of the international market.

A successful tourism product development strategy will however rest upon the ability to understand the needs of international and domestic tourists and the relationship between primary and secondary attractions. For KZN this is set out diagrammatically in the Chart over the page:
The Tourism Product Development Strategy focuses on infrastructure and product that will enable the growth of tourist numbers. This has been determined by the reality that the largest sectors of both domestic and foreign tourist source markets are seeking a coastal destination for their leisure holidays.

Research has revealed that the two main disappointments for departing foreign tourists was their lack of ability to interact with traditional culture and heritage, as well as wildlife.

The Tourism Product Development Strategy therefore focuses on strategic interventions that will address the above shortcomings.

- A Primary Tourism Product Development Strategy for KZN to build a reputation for its ‘Coastal Destinations’, which will include the need for a more focused ‘Destination Marketing’ strategy.
- A Parallel Tourism Product Development Strategy for the establishment of a Zulu Heritage and Cultural Trail, which will provide the enabling environment for broadening of ownership within the tourism sector, particularly within the rural and economically neglected areas.

Four spatial ‘Coastal Destinations’, each with its own differentiation in terms of product attraction, targeted tourist-source markets, and ability to create its own image / branding within the overall context of the Zulu Kingdom, will be developed.

The four Coastal Destinations are:
- Maputaland / St Lucia (Coastal linked to Wildlife)
- Dolphin Coast (Coastal linked to Zulu Heritage and Culture)
- Durban (Cosmopolitan Beachfront and Culture)
- South Coast (Coastal linked to Wild Coast)

Two spatial ‘Interior Destinations’, the Durban/Pietermaritzburg/Midlands Corridor and the uThukela Gateway/uKhahlamba-Drakensberg, will be developed.
The key attraction to draw tourists into rural areas has been identified as primarily being associated with Zulu Heritage and Culture. The creation of the Zulu Heritage and Cultural Trail is the principal development initiative in order to create a focus on strategic rural tourism product development. The development of this tourism route, which has the potential eventually to meander throughout KwaZulu-Natal, is considered as the ‘glue’ that will join together the wide diversity of rural cultural tourism attractions and sites of historical importance. More importantly it is anticipated that it will act as a catalyst for the opening up of previously disadvantaged areas for further tourism product development.

Initially the route will commence just north of Durban and run through to Northern Zululand as indicated diagrammatically below:

The Tourism Product Development Strategy has identified, amongst other issues, the need to focus on coastal destination product development and marketing, in order to widen access into relatively untapped foreign tourist-
source markets. These markets’ primary choice for leisure holidays are coastal destinations, but they also need to be offered unique additional activities associated with wildlife, heritage and culture.

**CORE DEVELOPMENT NODES**

The following core destinations with nodal points for development have been prioritised:

**Maputaland/St Lucia (Umlalazi River Mouth to Kosi Bay) - Wildlife**

**Primary Node:**
The Greater St Lucia Wetland Park (World Heritage Site), stretching from Cape St Lucia in the South to Kosi Bay in the North and inland, generally using the N2 as the Western Boundary.

**Secondary Nodes:**
- Hluhluwe-Umfolozi Park
- thala / Pongola
- Richards Bay Waterfront & Marina
- Linkage to the Zulu Heritage & Cultural Trail.

**Dolphin Coast (Westbrook to Umlalazi River Mouth) - The “King Shaka” Region & Gateway to Zulu Heritage & Culture.**

**Primary Node:**
The coastal stretch of beach from the Tongati River in the South to Tinley Manor in the North (King Shaka Coast).

**Secondary Nodes:**
- Linkage to Zulu Heritage & Cultural Trail
- Linkage to The Valley of 1000 Hills.

**Durban (Scottburgh to Westbrook) - A Zulu/Cosmopolitan Buzz and Vibrancy and Gateway to the North, West and South of KwaZulu-Natal**

**Primary Node:**
The Beachfront, stretching from the Point in the South to Blue Lagoon in the North.

**Secondary Nodes:**
- Eco-tourism linkage to The Valley of 1000 Hills
- Zulu Heritage & Culture and Township Tourism
- Durban Marina.

**The South Coast (Amanzimtoti to the Wild Coast) - The existing reputation of the South Coast as a Domestic Beach Destination linked to the emergence of the Wild Coast.**

**Primary Node:**
The coastal stretch of beach from Port Edward in the south to Port Shepstone in the north and creating a triangular node by going inland to include Oribi Gorge/Umzimkhulu Game Reserve.

**Secondary Nodes:**
- Future Linkages to the Zulu Heritage and Cultural Trail.

**Durban / Pietermaritzburg / Midlands Tourism Corridor - with its linkage to the Southern Drakensberg and the proposed Lesotho Loop.**

**Primary Node:**
The Valley of 1000 Hills.

**Secondary Nodes:**
- Southern Drakensberg
- Linkages to the Zulu Heritage and Cultural Trail.

**uThukela Gateway - linkage to the Ukahlamba-Drakensberg World Heritage Site, Wildlife, Heritage and Culture, and the Battlefields.**

**Primary Node:**
The Ukahlamba-Drakensberg World Heritage Site.

**Secondary Nodes:**
The Uthukela Gateway (Ladysmith/Colenso/Weenen/Estcourt corridor between the N3 in the West and the Thukela River in the East).
- Linkage of the ‘Battlefields’ to the Zulu Heritage and Cultural Trail.
In addition to identifying key nodes for development, TKZN has identified the following projects as being central to the success of its tourism strategy:

- Zulu Heritage & cultural trail spreading initially from the North Coast of KZN through to Nongoma prior to winding itself across the Province;
- King Shaka Tourism Route within the Ilembe District Council area;
- Emakhosini Heritage Park - Valley of the Kings & Ophathe Game Reserve;
- Isibaya - Royal Zulu House at Nongoma;
- Richards Bay Cruise Ship Passenger Terminal;
- Coastal Resort Development - Tongati River Mouth;
- Durban beachfront - Strategic tourism development plan;
- Repositioning of the Valley of the 1000 Hills;
- Mnweni Valley Development within the Ukhahlamba Drakensberg Park;
- uKhahlamba-Drakensberg Park - Access roads and signage;
- Marina Resorts Development on the Coast;
- Mzimkulu Nature Reserve on the South Coast;
- King Shaka International Airport.

These are not the only projects, which will be supported by TKZN, and a full list of projects is available in the Tourism Product Development Strategy.

In addition to focusing on delivery the core projects identified in the Strategic Framework for product development, TKZN will continue to provide an enabling environment for product development in the following areas:

**INVESTMENT PROMOTION**

The sustainable development of new tourism product requires private sector investment. In partnership with investment promotion agencies, TKZN will ensure that new tourism products are properly packaged to take to the market, and are then effectively profiled. TKZN will ensure that investment advice is available and accessible to potential investors and that public and community-based tourism infrastructure programmes are strategically aligned with those of investment promotion.

In addition, TKZN will assist with the facilitating investment through the concessioning of the management of community-based tourism projects, which have been funded by public and community funds.

These actions will be undertaken in co-operation with other provincial agencies and District Councils and the Durban Unicity.

**INFRASTRUCTURE DEVELOPMENT**

**Tourism signage**

TKZN will co-ordinate, together with the local government and the National and Provincial Departments of Transport, a drive to ensure that appropriate tourism signage is displayed along all major tourist routes in the Province.

The focus will be upon:

- proper tourism route and signage planning and branding;
- speeding up the application and approval process;
- providing limited partnership funding;

All efforts will be made to ensure that decision-making is devolved to local government in these areas.

**Tourism related infrastructure**

In order to open new areas of our Province to tourism traffic there needs to be significant public sector expenditure in infrastructure related to tourism product. In line with the Strategic framework for product development outlined above, TKZN will endeavour to access funding for
the provision of such infrastructure on the one hand, whilst working with other responsible government departments to lobby them to provide appropriate infrastructure.

**Development of public assets**

TKZN will support the development of public assets as tourist attractions in order to improve the product mix and increase the diversity of product within the province. In partnership with relevant institutions, TKZN will actively promote the development of these assets in a manner in which they are attractive to tourists.

**BROADENING OWNERSHIP**

The product development drive initiated by TKZN will be specifically aimed at broadening ownership within the industry. The key mechanisms for achieving this broadening of ownership includes:

**Community-based tourism development**

The sustainable development of tourist facilities, establish in rural areas, requires the support of surrounding communities. TKZN will develop a focused community-based tourism support process to assist communities to participate more directly within the tourism industry. This will include properly developed programmes around tourism awareness, education and training in specific projects, legal and institutional support, tourism management and aftercare. Where possible TKZN will also assist in facilitating linkages between community-based tourism product and the existing industry.

**Small business development**

The second form of support for the broadening of ownership will be in the form of support to small businesses within tourism. TKZN will play a role in especially identifying opportunities for small businesses on the one hand, and working with the relevant institutions in securing support for these enterprises on the other.

A specific area of focus will be in the area of education and training support within the construction sector in which a number of opportunities for small businesses are created.

**More generally, TKZN will support small business development through:**

- the organisations procurement policies;
- providing information and advice;
- facilitating marketing support;
- facilitating access to education and training.

**PRODUCT IMPROVEMENT**

In addition to the development of new products, TKZN will play a key role in monitoring current tourism products and ensure that they are effectively maintained and improved.

This will require a range of activities but will be in the following areas:

- Institutional mechanisms for product management;
- Tourism services;
- Service excellence programmes;
- Tourist guiding development programmes;
- New Route development for more effective marketing.
HOW DO WE DO IT?

CORPORATE GOVERNANCE

TKZN will be structured and managed in a manner that supports the implementation and continuous review of the strategy. This can only be achieved through establishing specific targets and monitoring progress.

This also requires establishing the required financial, administrative and human resource capacity necessary to successfully implement the strategy. In a similar manner as there are specific goals and targets set around tourism growth and development, TKZN will establish a governance structure with specific targets and monitor progress towards achieving these targets.

The Board of TKZN will in particular identify five to ten core actions which they believe will be fundamental to the tourism effort of the Province. The Board will set up specific mechanisms to monitor progress in the achievement of these key objectives and regularly communicate progress.

In addition, in order to try and meet the overall requirements of the strategy, TKZN will:

PUT PEOPLE FIRST!

The success of TKZN rests upon the extent to which the people within the organization are willing to drive and lead the process. An empowered management and staff are going to be central to achieving this goal.

The Board will maintain policy and strategic responsibility, whilst empowering management to execute programmes within these policy and strategy guidelines. All employees will be encouraged to take responsibility within their work areas and a performance management system will reward those employees who achieve.

TKZN will ensure that appropriate training programmes are in place to equip employees to deal with the implementation of the strategy.

TKZN will also encourage employees to pursue additional qualifications in order to acquire expertise relevant to the performance of their duties.

COMMUNICATING INTERNALLY & EXTERNALLY

The success of the strategy will also require that there are strong and effective communication channels both internally, between employees,
and externally in order to inform our stakeholders with regard to progress and our activities. A carefully planned internal and external communication programme will be at the cornerstone of TKZN’s efforts.

ALIGNING TKZN BEHIND THE STRATEGY

The management and governance of TKZN will be structured around the key objectives of the strategy. Performance-based remuneration of all staff against individual targets will assist in aligning employee activities behind the strategy.

INNOVATION

The TKZN Board, management and staff will strive to generate innovative solutions to work situations and facilitate their implementation, measurement and review.

CUSTOMER FOCUS

Employees will strive to make suppliers, stakeholders and institutional partners the focus of the organisation’s actions. This requires the establishment of transparent communication strategies and administrative systems.

FINANCIAL MANAGEMENT

TKZN will seek to establish efficient financial management systems and records, which empower the Board, and public to review the cost effectiveness and value of TKZN spend. Internal audits will be encouraged to review and monitor financial policies and practice. TKZN will rapidly implement the requirements of the Public Finance Management Act and establish appropriate mechanisms to comply with all legislation.

ADMINISTRATIVE & STAFF EXPENDITURE

The implementation of strategy will require that the majority of funds be spent on direct marketing and product development programmes and will require that both staff and administration costs be kept to below 25% of all expenditure.

FAIR, EQUITABLE PROCUREMENT AND EMPLOYMENT POLICIES AND PRACTICES

TKZN will strive to establish fair and equitable procurement and employment policies and practices, which comply with the labour and procurement legislation, and policy set by national and provincial spheres of government. Targets will be set within these areas and carefully monitored to assess progress and ensure compliance.

We invite you to join us in making these exciting plans a reality.

WE WILL GO BEYOND YOUR EXPECTATIONS
Wozani. Our Kingdom Calls

Prepared by:
The KwaZulu-Natal Tourism Authority
Suite 303, Tourist Junction
160 Pine Street, Durban 4001
PO Box 2516 Durban 4000
Tel. (031) 3667500
Fax. (031) 3056693
Email: tkzn@iafrica.com
http://www.zulu.org.za

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South African Tourism, Designing Women, Kim Thunder, Ivor Migdoll, Willz Photography, Phezulu Safari Park, Peter Pinnock, Steven Pryke, Andrew Jones and Roger de la Harpe.

Design & Layout:
design@designingwomen.co.za