MANDENI LOCAL MUNICIPALITY

TOURISM STRATEGY REVIEW AND RESEARCH ON ESTABLISHMENT
OF MUNICIPAL TOURISM INFORMATION CENTRE AND MUSEUM

PHASE 1: RESEARCH & TOURISM SITUATIONAL ANALYSIS

20 OCTOBER 2014

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APPENDIX A: Complete Documentation Review

Submitted by

Haley Sharpe Southern Africa (Pty) Ltd

Contact Person: Mike O'Brien

T: 031 764 0300 | **F**: 031 764 0307 | **C**: 082 444 9551 | **E**: mike@haleysharpesa.co.za

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ACRONYMS

CMP:	Coastal Management Plan
CTO:	Community Tourism Organisations
DAEARD:	Department of Agriculture, Environmental Affairs and Rural Development
DEDT:	Department of Economic Development and Tourism
DMO:	Destination Marketing Organisation
EI:	Enterprise iLembe
EKZN:	Ezemvelo KwaZulu-Natal Wildlife
EMF:	Environmental Management Framework
IDM:	iLembe District Municipality
IDP:	Integrated Development Planning
ITB:	Ingonyama Trust Land
HSSA:	Haley Sharpe Southern Africa
KZN:	KwaZulu-Natal
KZN TMP:	KwaZulu-Natal Tourism Master Plan
LUMS:	Land Use Management System
LED:	Local Economic Development
MLM:	Mandeni Local Municipality
MESE:	Meetings, Exhibitions and Special Events
NTSS:	National Tourism Sector Plan Strategy
NDT:	National Department of Tourism
PDA:	Planning and Development Act
PDI:	Previously Disadvantaged Individuals
PGDS:	Provincial Growth and Development Strategy
PGDP:	Provincial Growth and Development Plan
PPC:	Provincial Planning Commission
PRO:	Public Relations Officer
RSDP:	Regional Spatial Development Plan
SDF:	Spatial Development Frameworks
SMME:	Small Medium Micro Enterprise
TGCSA:	Tourism Grading Council of South Africa
TKZN:	Tourism KwaZulu-Natal
TC:	Traditional Council
TVG:	The Ventures Group
USP:	Unique Selling Point

1.   **INTRODUCTION & EXECUTIVE SUMMARY**

Mandeni Local Municipality (Mandeni or MLM) have appointed of Haley Sharpe Southern Africa (Pty) Ltd (HSSA), as at 5 August 2014, to conduct the Review of the Tourism Strategy and Research on the Establishment of the Municipal Tourism Information Centre and Museum (Project) for Mandeni, located in the iLembe District Municipality.

Mandeni is strategically located midway between Durban and Richards Bay, and lies on the development corridor on the North Coast between these two major port cities in KwaZulu-Natal. It is located on the major railway and road transportation routes which link these two economic hubs in KwaZulu-Natal. This strategic location is also acknowledged in the Provincial Spatial Framework which has identified Mandeni as the growth node in the north corridor.

The specific objectives of the project are understood to include:

➢   Development of the status-quo report of the municipality through the conducting of a situational analysis, SWOT and gap analysis.
➢   Development of a strategic development framework coupled with an Implementation Plan for the Mandeni tourism sector.
➢   Development of a marketing plan for Mandeni Tourism.
➢   Provision of a monitoring and evaluation framework for the implementation of the Tourism Sector Plan.
➢   Clear identification of leverage points and development trajectories within the tourism sector of Mandeni.
➢   Identification of the necessary institutional arrangement for tourism economic development.
➢   Undertake a value chain analysis and provide recommendations as they relate to the development of tourism for Mandeni.
➢   Assessment of the existing infrastructure capacities for tourism economic development. Where initiatives are identified for development, the Project must take cognisance of the infrastructure needs and make the necessary recommendations in terms of infrastructure development interventions in support of tourism interventions. In particular the feasibility of the establishment of a Tourism Information Centre and Museum.

On 13 August 2014, Mandeni Local Municipality (MLM) held a Project Inception Meeting. The purpose of the Inception Meeting was to review and agree the proposed project approach and methodology in order to ensure that it aligns with MLM expectations, as well as to review Project administration and communication matters.

On 12 September 2014, MLM held a LED Forum Strategy meeting, where the MLM LED Strategy, MLM SDF and the MLM Tourism Strategy were presented for comment and feedback. All three strategies are currently being reviewed by independent service providers. At this meeting, HSSA presented the summary of the findings of the Phase 1 Report, as it had been developed to date. HSSA also presented the initial

concept for the Mandeni Tourism Strategy, which has been proposed as an authentic African Village Beach Experience. It is understood that the proposition received support.

This Phase 1 Report has been further developed since the LED Forum Strategy meeting. It presents the Project status quo and background, which has resulted in the development of the proposed authentic African Village Beach experience concept. The inspiration for this initial concept can be found in Section 8 of this report. However, with the support and go-ahead from the Client, it will be further expanded, unpacked and presented in Phase 2.

This Phase 1 Report: Research & Tourism Situational Analysis, concludes the second milestone in accordance with the agreed project approach and methodology and comprises of the following:

Section 2:   **Documentation Review**

The complete Documentation Review is contained in Annexure A to the Phase 1 Report. The summary contained under Section 2 herein, provides highlights from all of the reviewed documents, in order to provide context from a broader perspective and the relevance to be carried through to the MLM Tourism Strategy.

The outcome from the Documentation Review is that the concept for a proposed African Beach Experience within the MLM can be considered as finding support.

Section 3:   **Institutional Structure Review**

From an institutional perspective, it is considered that MLM do not have an appropriate institutional structure capable of implementing and marketing the MLM Tourism Strategy. Additional resources will be required for programme and project management to undertake the planning and implementation phases. In addition, operational resources will need to be identified, preferably from within affected communities. It is considered that the greater local community/ies are to be involved, the greater the need will emerge for skills auditing and development related to specific projects.

Section 4:   **Market Demand Analysis**

The outcome from the market demand analysis can generally be considered as positive, albeit conservative in the approach to determining projected total visitor numbers' market share

Section 5:   **Tourism Product Supply Including Environmental & Cultural Heritage Issues**

Limited existing tourism product supply exists within the MLM. However, potential has been identified for possible planning and development of the proposed authentic African Village Beach Experience that could bring about tourism related socio-economic benefits to certain rural communities. Subject to approval by MLM further development planning for a way forward will be undertaken in Phase 2.

Section 6: Infrastructural & Accessibility Review

In general, the infrastructure and accessibility review was found to be very positive and supportive of the proposed beach development. Issues of signage and certain road conditions require attention, as well as security (perceptions and reality).

Section 7: Marketing Review

The marketing review has found that limited tourism marketing exists for MLM, and a complete Outline Marketing Strategy as well as Marketing Plan would be required.

Section 8: SWOT; Vision; & Gap & Options Review & Analysis

An initial SWOT, Vision and Gap and Options review has been prepared as part of this report which was, in essence, presented at the LED Forum Strategy Meeting on September 12th. Once feedback has been received on this Phase 1 report the concept option can be further developed and presented in Phase 2.

Conclusion:

The Situational Analysis Phase of the project is for the purpose of both desk-top and field research, in order to establish the current status of influencing factors in respect to the MLM Tourism Strategy and specifically the proposed African Village Beach Experience tourism product within the MLM area of jurisdiction.

➢ The Market Demand analysis indicates that demand does exist.

➢ Field research has identified product location potential, which could achieve the objective of attracting tourists into MLM.

➢ The current weakness of the institutional structuring for MLM is seen as a negative for implementation and on-going marketing, and will require immediate strategising.

➢ Infrastructure and accessibility do not appear to offer any constraints at this time, although elements of upgrading would be required.

➢ Overall, the prognosis for implementation of the proposed contemporary African Village Beach Experience within the MLM Tourism Strategy is seen as feasible. However, subject to discussions with the Client, it is recommended that further research is conducted and an initial concept design be drafted (the latter concept design is not part of the current terms of reference for HSSA and , therefore, HSSA requests further discussions with MLM as to an acceptable way forward in this regard.

➢ The location for the African Village Beach Experience is proposed as the area between Amatikulu and Siyaya Reserves, around the community of Dokodweni, which opens out onto the northern lagoon area of the Amatikulu River.

Subject to the outcomes of discussions with MLM, HSSA recommend proceeding with Phase 2: Tourism Strategy Development including Selection & Packaging of Catalyst Tourism Projects, based upon the above recommendations.

2. **DOCUMENTATION REVIEW SUMMARY**

The purpose of this section is to provide a summary overview of available documents that may provide valuable insight and context for the research aspects of the Mandeni Tourism Strategy Review and the research on the establishment of a Municipal Tourism Information Centre and Museum (referred to as, "Project"). This has included reviewing relevant legislation and planning reports from a national to a local level. Key aspects for the assignment revolve around identifying and developing a primary attraction (see definition in Section 5.3) for the area, together with supporting tourism diversity of product and facilities. An extended version of the Documentation Review can be found in Appendix A.

Table 1: Documentation Review Summary

Document Title & Description	Summary & Overview	Key Factors to consider for The Project
2.1 National Responsible Tourism Development Guidelines for South Africa, 2002	The National Responsible Tourism Development Guidelines is defined as a document that promotes responsibility to the environment through its sustainable use, responsibility to involve local communities in the tourism industry, responsibility safety and security to visitors. According to this report tourism is considered as playing a small role in SA economy and has a long way to go if it is to fulfil its potential and significantly contribute to the national income. It is indicated that traditionally, the main focus of governments has been on the growth in international arrivals and total foreign exchange earnings, and now is on fostering entrepreneurial opportunities for the historically disadvantaged, poverty relief, employment and local economic development.	The Project should follow the National Responsible Tourism Development Guidelines on aspects including responsibility to the environment, sustainable use, local community involvement as well as safety and security to visitors. Ideally, tourism is to focus not only on the international market, but more so on the local and domestic market.
2.2 National Tourism Sector Strategy, 2011	The draft National Tourism Strategy (NTS) was released for public comment by the National Department of Tourism (NDT) in mid-2010 and has subsequently been finalised. It is essential that KZN takes into consideration the national tourism agenda and that the strategy is aligned to the objectives and strategic interventions identified within the NTSS.	The Project should consider the report's comments on competitive advantage. The Project should aim to tap into natural sites and cultural resources, as well as attractive price competitiveness for hotel rooms. This should be understood and unpacked in terms of primary attractions (highlights), secondary attractions (diversity) and tourist facilities (revenue). The Project should seek to improve safety and security, and access to health services.
2.3 South African National Heritage Resources Act, 1999	The South African National Heritage Resources Act aims to promote good management of the national estate, and to enable and encourage communities to nurture and conserve their legacy so that it may be bequeathed to future generations. The Act indicates that our heritage is unique and precious and it cannot be renewed. Our heritage helps us to define our cultural identity and it therefore lies at the heart of our spiritual well being and has the power to build our nation. It has the potential to affirm our diverse cultures, and in so doing shape our national character. Our heritage celebrates our achievements and contributes to redressing past iniquities. It educates, it deepens our understanding of society and encourages us to empathise with the experience of others. It facilitates healing and material and symbolic restitution and it promotes new and previously neglected research into our rich oral traditions and customs.	It needs to be completely understood if and how the Zulu Heritage Route (Route 66) to the north of Mandeni, and the King Shaka Route to the south of Mandeni, plugs into The Project. Both routes are of great heritage significance, and as such, their development within The Project would need to be considered as per the aims of the Act: • Aims to promote management of the national estate • Encourages communities to nurture and conserve their legacy so that that it can be given to future generation • Understands the society and encourages the society to empathise with the experience. • Highlights the importance of the Zulu Heritage Route.

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
2.4 **National Heritage and Cultural Tourism Strategy, 2012**	The National Strategy on Heritage and Cultural Tourism Strategy serves to guide and provide strategic direction for the development and promotion of heritage and cultural tourism in South Africa. The report indicates that the strategy provides a framework for the coordination and integration of heritage and culture into the mainstream of tourism. This strategy has been informed by the White Paper on the Development of Tourism in South Africa (1996) as well as the National Tourism Sector Plan Strategy (NTSS) (2011). The vision as stated within this strategy is to realise the global competitiveness of South African heritage and cultural resource through product development for sustainable tourism and economic development. The mission is stated as to unlock the economic potential of heritage and cultural resources through responsible and sustainable tourism development; also to raise awareness of the ability of heritage and cultural tourism to contribute towards social cohesion.	The National Heritage and Cultural Tourism Strategy identifies many problematic areas within Heritage and Cultural tourism, which The Project should address. One of the major key concerns is to how to develop heritage and cultural tourism in such a way that it remains conserved, while being economically sustainable, and even profitable? The report suggests that the heritage and cultural tourist attraction is not necessarily enough of a draw card – on its own – keeping in mind the problematic dynamics of current heritage and cultural trends, to attract enough tourists continuously to enable sustainable heritage and cultural tourism. As such, The Project should aim to offer something to South Africa's main tourist attraction markets, as listed by the report, which includes safari and scenic natural environment. The Project needs to clearly define the primary attraction of Mandeni Local Municipality along these lines.
2.5 **National Rural Tourism Strategy, 2012**	The National Rural Strategy is meant to ensure a development approach upon packaging rural tourism in South Africa. The approach is also meant to prioritise spatial nodes which have a growth potential in order to stimulate growth of the tourism industry. Recommended Potential Pilot Rural Tourism Nodes in South Africa for KZN are identified as (High poverty rural nodes): Priority node for short term: 1. UMkhanyakude District (Jozini Node) Priority node for short / medium term: 1. Zululand 2. Ugu District 3. Umzinyathi District 4. Sisonke District	Although Mandeni Local Municipality has not been identified as a priority rural tourism node for either short or medium term for KZN, any rural tourism development within The Project should seek to follow the same developmental guidelines which are understood to include; • Aim to create decent employment through economic growth; • Aim to develop vibrant, equitable and sustainable rural communities; • Aim to increase the net benefits to rural people and increase their participation in managing the tourism product • Aim to involve a high level of local participation in decision making and enterprises
2.6 **KwaZulu–Natal Tourism Master Plan, 2011**	Tourism Master Plan is a document which provides a structural framework for success in the development, management and monitoring of tourism and an overarching plan that guides other tourism plans. The Master Plan describes the vision for KwaZulu-Natal which wants to be globally renowned as Africa's top beach destination with the unique blend of wild life, scenic and heritage to be appreciated and enjoyed by all visitors. The KwaZulu-Natal Tourism Master Plan (KZN TMP) document indicates that the primary focus is Durban beach experience, and priority will be given in all planning and product development to improving the actual, perceptions of this experience. The Tourism Master Plan indicates that heritage experiences encompass the province, and different KZN heritage experiences are used as a backdrop or ambience for all provincial experiences as well as being additional activities that people enjoying the other core experiences can partake in	The Project should aim to fit within KZN's vision to be globally renowned as Africa's top beach destination with the unique blend of wild life, scenic and heritage to be appreciated and enjoyed by all visitors. The Project should take into account KZN Master Plan's iconic projects (Drakensberg Cable Car, Breakwater/Monument/Statue, Bluff Bridge, King Shaka Statue, Isandlwana Development Precinct, Beach Resort and Convention Centre). Focus is to be not only on the foreign market, but more so on the domestic market. The Province is marketed as "The Zulu Kingdom". It is understood that it is mostly foreigners that are attracted to the cultural and heritage tourism offerings. Where does this leave the local market in terms of what KZN has to offer, and specifically its primary attraction? Furthermore, it is suggested

Document Title & Description	Summary & Overview	Key Factors to consider for The Project
	The KZN Tourism Master Plan indicates that Durban comes foremost to their minds of visitors, potential visitors and intermediaries when they think of the KZN province. The document states that the main issues identified are the loss of eThekwini's market share of visitors to other destinations e.g. the Cape and Mozambique; as well as a declining market share of foreign visitors. It is stated that this has been identified as primarily due to a lack of diversity and quality of tourism product and poor perceptions of a safe and clean environment, and crime. The KZN TMP indicates that in terms of Heritage Tourism Strategy the province is branded and promoted as a Zulu Kingdom which itself is unique in the global African and South African context. It is indicated that the quality and appropriate products that support this brand need to be identified and developed. It is indicated that heritage tourism experiences are therefore required on the main levels – an iconic or must see Zulu experience to support the heritage niche market and provide a general experience, for particularly international tourists, and then a range and a variety of heritage experience as an activity for beach, wildlife, scenic and other niche visitors. In addition it is indicated that culture and heritage should be evident in many ways as a thread that runs through all activities, products, services and facilities. The document indicates that there are projects planned that shows heritage experiences with an order of priority which are as follows: • The Zulu Valley of the Kings • The King Shaka Trail and • The Battlefields • Durban for activity heritage experiences to underpin the beach experience, e.g. struggle route, Inanda route and in • Developing and enhancing the Khoi San experience in the Drakensberg area. In terms of wildlife KZN has been identified as a fairly popular wildlife destination. It is indicated that the Province is not seen as or understood to be a wildlife destination. In addition the link of marine wildlife and the green and wetland environments are very different to the wildlife product elsewhere in SA. Therefore Marketing and product development is required to address this and create a top wildlife destination in the northern KZN.	that the Province is not delivering on culture and heritage. These are points of consideration for The Project in terms of understanding and strategising both iLembe District and Mandeni Local Municipalities within the larger provincial framework. The Project should define its iconic and must see Zulu experience for the foreign and domestic tourist. The Project should define any potential big game (wildlife) experiences. The Project should address its heritage experiences, as understood as niche products e.g. cruise, avi-tourism, adventure, diving, etc enjoyed by some tourists who travel specifically for that experience only. The Project should aim to be included in the new itineraries for the promotion of Rural Tourism. The document indicates the types of museums or interpretive facilities that can be developed for heritage experiences which as follows: • Museum • Living Museum • Interpretive / Interpretation Centre • Visitor Centre • Heritage Centre However, the success of such heritage experiences in terms of conservation and sustainability needs to be carefully considered. Current tourism organisations, planning and promotion do not focus heavily on rural tourism. The Project will need to develop its own rural tourism strategy.
2.7 **KZN Heritage Act, 2008**	KwaZulu – Natal Heritage Act 2008 indicates that Amafa is the provincial heritage conservation agency for KwaZulu Natal. • Amafa was established as a statutory body in terms of the KZN Heritage Act of 1997, replaced by the KZN Heritage Act of 2008.	The Project will need to consider the Act with regards to Interpretive and tourism related projects and programmes. The following locations, within close proximity to The Project, are recognised as Heritage sites:

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
	• The Council of Amafa is appointed by the Premier of KZN, and is funded through a grant from the same department. • In terms of the Act, Amafa's responsibilities towards tourism includes the establishment of educational, training, interpretative and tourism-related projects and programmes with due regard to national and provincial heritage policy and programmes. Amafa must also liaise with national and provincial departments, statutory bodies and organisations concerned with arts, culture, tourism and heritage matters. • The Act does not prescribe how Amafa must carry out its responsibilities in terms of tourism projects or stakeholder liaison.	KwaDukuza Local Council: • Fort Pearson, Farm William 15437, Lower Thukela District • Ultimatum Tree, Farm Lot 5 2612, Lower Thukela District • Isivundu House, Farm Isivundu 1954, Lower Thukela District • Kearsney Methodist Chapel, Farm Kearsney 2201, Lower Thukela District • Morewood Sugar Mill Memorial Garden, Farm Compensation 868, Lower Thukela District • Chief Albert Luthuli Homestead, Farm Charlottedale 6014, Lower Thukela District • Bogmore Farm Compensation 868, Lower Thukela District • Grave of Chief Albert Luthuli, Farm Charlottedale 6014, Lower Thukela District Umlalazi Local Council: • Fort Tenedos, Farm Alliance 14837 • Thukela Battlefield, Lot 14 Farm Thukela 10600 Nothing is mentioned of Mandeni Local Municipality specifically.
2.8	**KwaZulu-Natal Tourism Act 1996 (amended 2002)**	KwaZulu-Natal Tourism Act 1996 is a document which provides the establishment of bodies to develop, promote and market tourism in KZN within the framework of government policy. The Act has set out provincial powers as: • International tourism marketing; • National tourism marketing; • Planning, development and promotion of tourism products for the province; • Implementation of national and provincial tourism policies; and • Integrated marketing and development of the tourism industry of the province.	It is important that The Project align itself with the Act, which has identified specific functions of municipal tourism, which include: • Monitoring local tourism operators and establishments for compliance with provincial policies and legislation; • Promotion, marketing and development of local tourism within the metro or district area; • Alignment of local tourism marketing initiatives with provincial tourism marketing strategies; • Facilitation of the participation of local communities in the tourism industry; • Securing equitable distribution of local tourism resources within the area of the municipality; • Adopting measures and programmes to transform the local tourism industry; • Implementing provincial tourism policy in conjunction with the provincial tourism authority; and • Any other functions specified in national or provincial policies of legislation.
2.9	**Provincial Growth and Development Strategy, 2012**	The vision of KZN is described as, "By 2030 KwaZulu-Natal will be a prosperous Province with a healthy, secure and skilled population, acting as a gateway to Africa and the World". It is further described that by 2030, the KZN should have maximized its position as a gateway to South and southern Africa, as well as its human and natural resources so creating a safe, healthy and sustainable living environment. Abject poverty, inequality, unemployment and the current disease burden should be history, basic services must have reached its entire people, domestic and foreign investors are attracted by world class infrastructure and a skilled labour force. The people will have options on where and how they opt to live, work and play, where the principle of putting people first and where leadership, partnership and prosperity in action, has become a normal way of life.	The Project should aim to fit within the PGDS vision, which is, "By 2030 KwaZulu-Natal will be a prosperous Province with a healthy, secure and skilled population, acting as a gateway to Africa and the World". Although various public and private role-players are actively dedicated to protecting and managing the balance between biodiversity and development within KwaZulu-Natal, these efforts are still widely un-coordinated and will need to be addressed to achieve a singular effort towards integrated sustainable development. This is of significance with respect to the reserves within The Project. Further points worth noting with regards to BULK infrastructure include: • The area along the coast between the Tongati and the Thukela Rivers within the iLembe

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
	The purpose of the 2011 KZN PGDS is to: • Be the primary growth and development strategy for KwaZulu-Natal to 2030; • Mobilise and synchronise strategic plans and investment priorities in all spheres of government, state owned entities, business, higher education institutions, labour, civil society and all other social partners in order to achieve the desired growth and development goals, objectives and outcomes; • Spatially contextualise and prioritise interventions so as to achieve greater spatial equity; • Develop clearly defined institutional arrangements that ensure decisive leadership, robust management, thorough implementation and ongoing review of the growth and development plan.	District Municipality is experiencing developments of large residential estates and industries, which require additional water resources for the North Coast supply area. In addition, the development of the Dube Trade Port, which includes the King Shaka Airport and the commercial and residential development that the trade port will attract in the vicinity of La Mercy, will also result in increasing water requirements. • The Thukela WMA still has surplus water available and also has potential to be further developed with additional damming. • A number of activities, like the mining activities within the Thukela and Usutu-Mhlatuze catchment areas, are currently threatening the natural environment and the water resources on a provincial scale. Coastal resources are also under threat, through over exploitation of fish reserves, as well as development pressures from residential developments along the coast. NOTE: uThukela District Municipality is separate to Zululand District Municipality, which is separate from iLembe District Municipality (Mandeni Local Municipality). This becomes relevant when considering the tourism product associations of Thukela River and Zululand .
2.10 **Provincial Growth & Development Plan, 2013**	The report explains that in February 2011 the KwaZulu-Natal Provincial Executive Council tasked the Provincial Planning Commission (PPC) to undertake a review of the existing Provincial Strategy and prepare the 2011 KwaZulu-Natal Provincial Growth and Development Strategy (PGDS) to drive and direct growth and development in the Province to the year 2030. The PGDS consists of a Situational Overview (August 2011) which surveyed the growth and development situation in the Province, sets a vision on where the Province aims to be in 2030, identifies seven strategic goals and thirty strategic objectives that will drive the Province towards this vision. This report looks at seven strategic goals including; job creation, human resource development , human community development, strategic infrastructure, environmental sustainability, governance and policy and spatial equity, as well as their corresponding strategic objectives. The report further identifies specific interventions and catalytic projects which will propel the Province towards achieving the set targets. Tourism is briefly mentioned as a means to increase job creation and influence economic development. The specific intervention is to Develop, Diversify and Market the Tourism Sector to increase Domestic and Foreign Visitors. The tourism industry is recognised as a priority growth sector.	The Project should aim to fit within the PGDP vision, which is the same as the strategy, "By 2030 KwaZulu-Natal will be a prosperous Province with a healthy, secure and skilled population, acting as a gateway to Africa and the World". Catalytic Projects that could be of relevance to The Project include: • Airport Rapid Rail Transit (develop fast-rail from Kwadukuza through Dube Tradeport / Airport, Gateway / Umhlanag, to Durban), • Nonoti Beach Tourism Resort (This is to be built on community owned land and they will become partners in the business. The proposed location is on the north coast of KZN, north of Blythedale and south of Zinkwazi), • Thukela Agricultural Hub (proposed development of a high-value intensive farming zone for local and export markets), • Thukela Estate Agricultural Project (private sector partnership with the Thukela Estate Committee to include crop, vegetable production and grazing land), • Thukela Dam (development of a new dam on the Thukela River with extensive capacity for hydro-energy generation), • Ballito ICC (4000 delegate convention centre), • Ballito Industrial Park, Blythedale Coastal Resort (a combination of residence, retail space, hotel, water park, golf school, sporting school), • Thukela Health and Wellness Centre (private hospital, rehabilitation centre, step-down facility, residential development, medical treatment), • iLembe Techno Park (electrical and components manufacturing).

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
		The need for additional water resources is recognised as a result of increased developments of residential estates and industries between the Tongati and Thukela Rivers, within the iLembe District Municipality.
2.11 **EKZNW C-Plan (undated)**	Ezemvelo KwaZulu-Natal Wildlife (EKZNW) developed and compiled the "C-Plan" which identifies land, which is valuable from a biodiversity conservation perspective, by mapping the distributions of 260 rare and endangered species. It is indicated that land is classified according to its conservation value, ranging from "Excluded" (completely transformed, e.g. residential areas) to "Protected" (current protected areas). Land that is not officially protected but important for biodiversity conservation is classified as "Mandatory Reserve" (not easily replaceable). The document indicates that EKZNW and other stakeholders oppose inappropriate developments in these areas due to the threat they pose to the environmental integrity of an area. It is also highlighted from a tourism development perspective, tracts of land identified as highly irreplaceable (e.g. Wattle Crane nesting sites) need to be treated with sensitivity. These areas may have tourism potential but require extensive consultation with EKZNW and other stakeholders to determine what level of development (if any) will facilitate tourism growth without endangering the environmental integrity of the area.	The provisions of the "C Plan" must be taken into account by The Project. This has relevance when it comes to the formally proclaimed conservation and nature reserve areas which fall within the project scope.
2.12 **KwaZulu-Natal Tourism Strategy 2008 – 2012**	The Tourism KwaZulu–Natal Tourism Strategy indicates that KwaZulu–Natal (KZN) Authority, trading as Tourism KwaZulu-Natal (TKZN), was established in terms of KZN Tourism Act, 1996 as amended by Act No.2 of 2002. The document indicates that 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. The document indicates that TKZN developed a tourism strategic plan for the period 2006-2011, since then a lot of developments have taken place and opportunities have arisen. The document highlights that in order to ensure that the strategy is properly aligned, TKZN has engaged in a strategy review process which has taken into consideration the anticipated changes in the macro and competitive market environments. As part of this process the strategy has been rolled over from 2011 to 2012.	The Project will have to address the creation of strategic partnerships with TKZN in order that it could be included in their marketing campaigns as well as in the planning processes. The Project will need to consider how Mandeni Local Municipality fits within KZN with regards to branding KZN is known as the "Zulu Kingdom". However, all three of the following sub-brands could be associated with The Project: North Coast: "The Jewel of the Zulu Kingdom". Battlefields: "Legends of the Zulu Kingdom" Zululand: "Heart & Pulse of the Zulu Kingdom" Noted, the North Coast is known as the Dolphin Coast, and is said to stretch from Zinkwazi to the Thukela River. This, technically, does not include Mandeni. http://www.zulu.org.za/discover/destinations/north-coast These sub-brands are confusing as it limits the offerings of certain areas.
2.13 **White Paper on the Development and Promotion of Tourism in KwaZulu–Natal**	White paper on the Development and Promotion of Tourism is a document that provides a foundation and competitive strategies for KwaZulu-Natal linked to existing nation and provincial strategies.	The Project should aim to fit within the vision, "to position KZN province as Africa's leading Eco – Cultural Tourism destination, nationally and internationally"

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
2008	The White Paper on the Development and Promotion of Tourism in KZN provides a vision for tourism - *"to position KZN province as Africa's leading Eco – Cultural Tourism destination, nationally and internationally"*. The mission is *"to initiate, facilitate, co-ordinate and implement 'Experience – based' tourism marketing, and 'Demand – driven' tourism development in order to achieve the tourism growth objectives, and thereby, contribute to shared and suitable economic growth and development in the Province"*.	The Project will be guided by the principles as stated in the White Paper on the Development and Promotion of Tourism in KZN.

2.14 **Environmental Management Framework for iLembe District Municipality (2013)**	This report has been put together by Royal Haskoning DHV for KZN DAEA and iLembe District Municipality. The purpose of the EMF is to provide a framework which will inform the Integrated Development Planning (IDP) process and Spatial Development Frameworks (SDF) within the District, as well as to provide a framework for environmental decision making by: Providing definite criteria for decision making; Providing an objective environmental sensitivity overview; Defining and categorisation of environmental, social and heritage resources, economic and institutional aspects; Identify sensitive areas spatially; and Formulating management guidelines.	The Project should consider opportunities as identified by the report:
		• Tourism in the hinterland
		• Maintaining a sense of place and viewsheds
		• Cultural and heritage resources for tourism
		• Celebrating local architectural vernaculars
		• Using the scenic qualities associated with the dramatic landscapes of the Umvoti and Thukela river systems
		• Link between beach and hinterland
		
		Of further consideration for The Project are the following points as indicated by the report:
		• Management considerations however, include existing cultural and heritage resources and areas of aesthetic and ecological value.
		• The report notes that local municipalities have a low level of rural electrification networking.
		• Within the Coastal management Zone, the fishing industries are recognised as the stakeholders responsible for inputs and licensing; and local programmes.
		• Compatible activities are listed as;
		   o Tourism activities, conservation, protected areas and private nature reserves (although new infrastructure needs careful consideration)
		   o Infrastructure associated with public access to coastal resources
		   o Small scale fishing and fishing industry facilities at established small craft harbours

2.15 **iLembe District Municipality EMF: Coastal Management Status Quo Report, 2012**	This is a document produced by SSI, a DHW Company, engineers and environmental consultants, for the iLembe District Municipality. It provides a status quo report on coastal management within the iLembe District Municipality. The report reviews a number of legislation documents, identifies sensitive areas within KwaDukuza and Mandeni, it identifies current key issues, opportunities, important considerations and potential conflicts within KwaDukaza, Mandeni and iLembe as a whole. The report concludes with a list of recommendations for KwaDukaza, Mandeni and iLembe and provides a very succinct overview of how the coast should be managed within the iLembe District Municipality, and that is holistically, rather than each department (such as tourism) working in isolation.	Relevant to Mandeni Local Municipality and what The Project should consider: Mandeni have not adopted a Coastal Management Plan, however, they did prepare and adopt the Siyaya Coastal Management Plan 2005, which provides specific coastal management and development planning direction for Mandeni coastal zone. The coastline of Mandeni, which stretches from south of the Thukela River, is characterised by a roughly even split of Moderate Risk and Risk areas, with the only area of High Risk located at the Thukela River mouth itself. This is in contrast to KwaDukuza which is characterised with a lot more interspersed High Risk Areas.

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
		Already limited opportunities for beach recreation, such as swimming, will be decreased in the face of narrower beaches, due to increased frequency of storm events and rates of erosion. The potentially inappropriate development at Thukela Mouth as a result of the high demand for tourism development is recognised as a key issue. Boat launching and Boat fishing – potential for establishing artificial reefs for diving, spearfishing and scuba diving as well boat based dolphin-watching, peak in shore angling fishing in winter due to the presence of shad, alternate beach activities: oyster harvesting; use of fishing skis; walking; swimming, establishing artificial reefs for diving, the possible installation of Fish Aggregating Devices (FADs); are recognised as an opportunity.

2.16 **iLembe District Municipality Regional Spatial Development Plan, 2013**	This report was prepared by Iyer Urban Design Studio for the iLembe District Municipality. The IRSDP report gives effect to the iLembe Spatial Development Framework (SDF), which forms part of the IDP and provides guidance on the preparation of the Land Use Management System (LUMS) for the municipal area.
	
	This Consolidated Report for the iLembe Regional Spatial Plan (IRSDP) presents an overview of the planning and recommendations emanating from a planning process conducted by the iLembe District Municipality. Key components of the iLembe Regional Spatial Plan reflected in the report includes:
	• The Vision and Basic Building Blocks
	• The Proposed Phasing of the Plan
	• The Sectoral Responses to implementing the Vision
	• The Implementation Plan, including guidelines and standards
		Tourism development is identified as one of the main economic drivers, along with agricultural development and green industry projects.
		
		Relevant to Mandeni Local Municipality and what The Project should consider:
		• The report suggests that residential growth and expansion occur in Mandeni.
		• Also that a Western Bypass be built within the next twenty years from KwaDukuza to Mandeni.
		• A new reservoir north of the town of Mandeni is planned.
		• The report notes that rural tourism development is undeveloped in iLembe as the focus of the private sector has to date been on coastal tourism development. The need to diversify the tourism offering is, however, generally acknowledged. It is foreseen that the impact of the tourism sector will be area specific, i.e. it will not have as wide a spatial impact as some of the interventions proposed. However, the impact on the specific areas may be substantial.
		   o Intervention 1: Development of Adventure Based Tourism Clusters: Adventure based tourism nodes and community conservation areas can either be linked or developed separately. The recommendation, however, is that there should be a move away from supporting the establishment of small isolated tourism products in rural areas. The focus should rather be on developing a range of activities in a specific geographic area. In this regard the adventure tourism industry offers substantial potential.
		   o Intervention 2: Strengthening of the King Shaka Tourism Route: The various components of this route has been the focus of numerous studies and the successful future development of this route will be dependent on effective management thereof by the respective tourism associations and individual product owners (whether private, government, NGO or community sectors).

2.17 **iLembe District Municipality 5**	This new five year 3rd generation IDP of ILembe District Municipality seeks to simplify	The Project should aim to fit within the vision, which is, To be a World Class African Destination,

Document Title & Description	Summary & Overview	Key Factors to consider for The Project
year 2012 – 2017 Integrated Development Programme	IDP rhetoric and focus on the outcome and impact of service delivery. It is imperative to note that for next five years ILembe District Municipality will upscale service delivery aligned with the call from President Jacob Zuma to induce service delivery through methods that ensure employment and reduce poverty levels thus improving quality of life for ILembe residents.

The 2012 – 2013 iLembe IDP brings a new era on performance based service delivery strategy that incorporates various government tools that focus on performance, alignment, IGR, job creation and "speedy service delivery".

iLembe's key economic drivers are agriculture, manufacturing, tourism and services.

iLembe's vision for 2027 is, To be a World Class African Destination, with excellent services and Quality of life for its' people. The following five economic factors have been identified; agriculture, manufacturing, information technology, tourism and city building.

In the Enterprise iLembe Structure there appears to be a vacant manager position within the Tourism Sector. | with excellent services and Quality of life for its' people. The following five economic factors have been identified; agriculture, manufacturing, information technology, tourism and city building, by 2027.

The report identifies that in the district there are two ecotourism destinations which are currently managed by Ezemvelo KZN: Harrold Johnson Nature Reserve, Amatikulu Nature Reserve and number of conservancies.

The iLembe District features sufficient unique selling points to prosper within its own niche market on the following basis (The Project will need to assess where Mandeni fits in):

- Pristine beaches and a relatively unspoilt natural environment, undermines the claim of being "The Jewel of the Kingdom of the Zulu".
- Centrally located to the provinces other major assets, i.e. Game Reserves, St. Lucia World Heritage Site, the Berg, Battle Fields and Durban. This places this District within a two-hour drive of many of KZNs natural attractions and two World Heritage Sites.
- International and local recognition and interest in King Shaka and Zulu culture and history. This diverse and rich cultural heritage has potential for growing and broad international appeal.
- Strong cultural and historical links to India, the United Kingdom and Mauritius.
- A sub-tropical climate positions it as an all year round tourism destination.
- Unique quality of the District's agricultural attributes of soil types, climatic diversity and rainfall.

Relevant to Mandeni Local Municipality and what The Project should consider:

- The scenic coastal strip in the Mandeni Local Municipality is under severe pressure for development. The Local Municipality SDF has identified parts of this strip for tourism development in particular the Thukela Mouth and primarily wards 1, 2 and 3 of the Macambini traditional authority area. For this reason a tourism intervention zone has been introduced which falls within the peri-urban zone. Development within this zone will be low density, eco-friendly that reduces the ecological footprint of the development.
- Tourism projects identified for the Mandeni Local Municipality include; Macambini Resort, Thukela Lifestyle Resort and Thukela Mouth.
- Mandeni does not have a hospital therefore referred cases that die are reflected at KwaDukuza sub district which provides as a district hospital services for Mandeni population.
- Greening project in Mandeni: DAEARD has procured a greening project for the Hlomendlini ward. Project details as follow: 300 households have been selected in the Hlomendlini ward to be greened .Each household will be provided with two trees one indigenous and one fruit tree. 18 community workers will be selected from the local area to implement this project. Implements have also been procured for the community workers DAEARD. |

Document Title & Description	Summary & Overview	Key Factors to consider for The Project
		• Mandeni CMP is expected to be developed concurrently with the EMF process and iLembe is overseeing the EMF process. • A key impact within the Environmental Matrix is listed as illegal 4x4 uses on the beaches. The strategy is to promote awareness and implement Coastal Management Act through coastal monitoring and municipal coastal by-laws. • The Traditional Authority areas cover approximately 63% of the total area where the State and the Ingonyama Trust own the majority of the land within the Municipality. Informal settlements with limited, to no facilities or infrastructural services, occur on the periphery of the developed areas and within the Isithebe Industrial area and Sundumbili Township. • The greatest backlog in terms of water provision is in Mandeni and Ndwedwe.
2.18 **Consolidated iLembe Local Economic Development Strategy, 2008.**	The report explains that the purpose of the 2008 iLembe LED Strategy document is to utilise the outcome of the GDS report to formulate and implement a LED strategy for the next 5 years, to achieve economic growth and development. It aims to bring about higher levels of economic activity in iLembe by placing a great emphasis on the role of the District Municipality in making this possible and in so doing, address those issues addressed by the GDS. The 2008 iLembe LED strategy is also formulated within the context of the relevant national and provincial economically related policies and programmes, the LED's of the local four municipalities as well as the sector specific strategies that have been formulated for this purpose. The iLembe Tourism Vision is to develop the iLembe North Coast into a preferred tourism destination by meeting the demands of both international and domestic tourists through a co-ordinated approach to tourism management, marketing and product development, by building on the district's rich cultural heritage, natural resources, excellent weather, and relaxation favourable lifestyle. Goal 1 – To improve the management of tourism in iLembe. Goal 2 – Developing an effective, targeted and comprehensive strategy for the marketing of tourism products in iLembe. Goal 3 – Ensure that the tourism products on offer in iLembe reflect the diversity of the cultural, historical, natural and beach attractions in the area.	Relevant to Mandeni Local Municipality and what The Project should consider: • iLembe offers Cultural and heritage tourism, Beach tourism and Nature–based tourism. • Coastal areas, such as Thukela Mouth, currently have a modest emphasis upon, but with possibly significant potential for further expansion, especially given the potential linkages to cultural tourism and ecotourism. • Cultural and heritage tourism is recognised as a gap and opportunity within iLembe, within the context of local competitive advantage. • Key tourism products for iLembe are listed as Develop the iLembe North Coast Tourism office, Upgrade of King Shaka Heritage Route.
2.19 **iLembe District Municipality Spatial Economic Dependent Strategy, 2012**	The ILembe District has as a visionary approach to development in all its aspects: Vision 2027: To be a World Class African Destination, with excellent services and quality of life for its people. Quality of life for its people. The document indicates that to this end the Municipality has commissioned and completed a range of studies and frameworks aimed at providing a base of information	The Project should consider the following with regards to tourism within iLembe District Municipality: Primary Corridor: Coastal Corridor from Ballito to north of the Thukela Mouth Secondary Corridors: Inland linkages to Maphumulo and Ndwedwe This corridor forms the eastern section along the coastline from Sheffield Beach to the most northern boundary of the iLembe District (also known and referred to as the Macambini Area). The

Document Title & Description	Summary & Overview	Key Factors to consider for The Project
	from which coherent and detailed planning may proceed. The aim of the current project, the District Spatial Economic Development Strategy, is to bring together information from the range of sources and sectors, analyse the economic base on which development depends and make recommendations as to the development trajectory most appropriate for the range of stakeholders and environments (human, social, natural and economic environments) with which Ilembe is blessed. This strategy, once formulated and adopted by the relevant leadership of the District stakeholders, will lead to the formulation of the ILembe Regional Spatial Development Plan (RSDP). The RSDP is intended to provide a clear direction for detailed integrated development plans and infrastructure delivery plans, and will guide the management of development and economic growth in the region. National Government has this year formulated a National Development Plan, and the KwaZulu-Natal Government has formulated a Provincial Growth and Development Plan (PGDP), both speaking to the 2030 vision for the country and the Province. Similarly the District of Ilembe needs to have a long-term strategy and plan for achieving its vision for growth and development by the year 2030. The development of this strategy is critical to the more detailed planning that must happen as part of the 5-yearly formulation of Integrated Development Plans (IDPs) of the District and Local Municipalities, which are assessed on an annual basis.	intention of the corridor is to promote venture tourism (sport and recreational facilities) as well as nature conservation based tourism, with direct linkages to the inland culture and community based tourism. The corridor allows for excellent access to infrastructure support services and thus ideally suited for Resort Development and / or Gated Lifestyle Development. In the high road scenario the coast of iLembe has developed as an internationally recognized coastal resort destination. Already several resorts are successfully drawing tourists to the area. Resorts offer a wide variety of products and packages that appeal to several market segments. 3, 4 and 5 star accommodation options are available, packages include heritage, golfing, eco, medical, agri, and wildlife packages. The experience of the North Coast is world class, safe and unique. The King Shaka Heritage Route has become a must see attraction in South Africa. The following strategies need to be undertaken in order to achieve this goal. • Encourage sustainable coastal resort development through conducting intelligent market research, improving transport infrastructure, and ensuring environmental assessments are adhered to. • Develop tourism in the hinterland by developing attractions along the hinterland routes, and integrating the King Shaka Heritage route into these attractions, • Tourism promotion and information distribution by offering competitive tourism packages and building information centres, map stands and stops on all proposed tourism routes. • Provision of support services that include training colleges, in house training programmes, entrepreneur development, strengthening of tourism bodies, and tour guide development.
2.20 **Mandeni Coastal Management Programme, 2013**	This report has been put together by Royal Haskoning DHV for Mandeni Local Municipality. It is noted that the same company prepared the iLembe Environmental Management Framework Plan (2013). Broadly, the aim of a municipal CMP is to achieve the ICM objectives in the coastal area under municipal jurisdiction, part of which means ensuring consistency with national and provincial objectives. The report notes that that the Mandeni CMP cannot provide solutions to all of the problems experienced along the Mandeni coast. Large portions of Mandeni are recognised by Enzemvelo as high priority in terms of biodiversity and as such many of these areas are classified as protected areas. The report identifies seven even key priority areas and include; Corporate Governance, Coastal Planning & Development, Climate Change & Dynamic Coastal Processes, Land & Marine Based Sources of Pollution & Waste, Estuaries, the Facilitation of Coastal Access, Natural Resource Management. The report then goes into key issues,	The Project should consider The vision for the Mandeni Coast is: A unique and conserved coastline that offers spatial equity, access and opportunities for all. It needs to be understood what area of The Project is considered protected areas by Enzemvelo. It is understood from the report that the Thukela estuary is considered critically endangered because it has lost much of its original natural habitat. In contrast, the Matigulu / Nyoni estuary's ecological well being has been described as largely natural with a few modifications. The Project needs to take into account any amendments to the so-called Off Road Vehicle Registration and potential implications for the existing Lebotes and Amatikulu launch sites. Part of The Project plan could be to develop additional beach recreational nodes, as the report suggests is lacking in Mandeni. However, the point of it being a swimming beach (with life guards and shark nets), as well as the potential of being a blue flag beach, needs to be addressed. There is

Document Title & Description	Summary & Overview	Key Factors to consider for The Project
	objectives and goals for each key priority area. Under Corporate Governance, amendments to the so-called Off Road Vehicle Registration and potential implications for the existing Lebotes and Amatikulu launch sites is identified as a key issue, as well as lack of on-going marketing / awareness raising programmes promoting Mandeni as a tourism destination.	the option of a tidal pool. The Project should understand how boat launch sites are currently managed. There is no mention of the launch sites being closed. However, boats launching need to be licensed to do so. The two main launch sites are Lebotes and Amatikulu. The Project should aim to take into account the five precinct areas, as identified by the report, including; Thukela South, Thukela North, Amatikulu, Dokodweni and the Default Coastal Zone.
2.21 **Mandeni Municipality Local Economic Development Strategy, 1st Draft - 2014**	This report has been prepared by Mandeni Local Municipality (MLM) and is a Sector Plan of the Integrated Development Plan. The report presents an analysis of the current economic development situation within the MLM, and identifies external and internal factors that impacts on the economic performance and growth within the district. It will serve as a resource document for project specific planning and the basis for the formulation of a shared local economic development strategy. The report identifies the following potential tourism products for Mandeni; angling fishing (the report describes that at present, though highly popular at Thukela Mouth, angling in Mandeni Local Municipality has not reached its true potential. Access to fishing spots is largely limited to Thukela Mouth and Amatikulu with the beaches in between virtually inaccessible, particularly with the current 4X4 beach driving ban in place. Increased access to beaches north of Thukela Mouth and at the river mouth itself could encourage angling tourism even further), Thukela River, Nature Reserves (Ngwenya, Harold Johnson and Amatikulu), Historical Sites (the Ultimatum Tree, Fort Pearson and Fort Tenedos, the battle sites of Ndondakusuka and the Thukela and the John Dunn settlement), accommodation. The report strongly suggests that a blue flag beach is not possible within Mandeni and furthermore, it would not represent the best use of the Mandeni coastline. The report lists the following Tourism SWOT: Strengths: The beach, Conservation areas, Harold Johnson, Amatikulu Nature Reserve, Rich heritage, Strategically located land for upmarket and holiday resort developments. Weakness: Poorly developed tourism sector. Opportunities: Location within the Zulu-Heritage Route, Location along the coastline, Provincial tourism marketing, Ezemvelo KZN Wildlife. Threats: Land ownership and availability, Environmentally sensitive areas. The report describes the following approach to tourism product development: Merely	The Project area scope is at least to include consideration of; • Angling fishing • Potential fishing spots • Thukela Mouth • Amatikulu • Thukela River • Blue flag beach • Nature reserves (Ngwenya, Harold Johnson and Amatikulu) • Zulu heritage and Historical Sites (the Ultimatum Tree, Fort Pearson and Fort Tenedos, the battle sites of Ndondakusuka and the Thukela and the John Dunn settlement) • Ndulunde Hills and Ndondakusuka Hill • Signage • Marketing • Market segmentation • Accommodation There is the opportunity to develop cluster tourism products. However, a clear primary attraction for Mandeni is lacking. *** This document is currently under review by Isibuko SE Africa.***

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
	developing further the existing tourism attractions in Mandeni is insufficient as a strategy to increase tourist numbers. Primary attractions need to be developed in Mandeni. These are attractions that people will come to the area especially to visit. Clusters of secondary attractions will develop around a primary attraction thereby further increasing the number of tourists to an area and extending their length of stay. Mandeni's tourism product (what it offers tourists) must be differentiated from the tourism products offered at surrounding destinations. The following are some of the tourism products that should be investigated in Mandeni (focused on angling, blue flag beach and nature reserves, heritage tourism. Signage, marketing, market segmentation).	
2.22 **Mandeni Local Municipality Draft Integrated Development Plan 2012-2017.**	The report explains the following challenges currently facing Mandeni; roads, electricity, water and sanitation, financial viability and revenue enhancement, LED, institutional arrangements and organisational capacity, social services, youth and women empowerment, spatial distortion and inequalities, environmental management and natural resource and human settlement. Of significance to this project is environmental management, where there is lack of capacity within the Municipality to deal with Environmental Management issues and the Municipality have no Strategic Environmental Planning and Management tools to inform decision making i.e. EMF, Coastal Management Plan. The report lists a number of strategies to address the above challenges. Of significance is promoting and facilitating development and investment along the coast in a harmonized and sustainable manner – environmentally, economically and socially with specific reference to the Siyaya Development Framework Plan and Promoting investment within defined nodes and specific to the functionality of such nodes i.e. Mandeni, Thukela Mouth, Wangu and Isithebe Industrial Zone. The report describes the following offerings of Mandeni; location, natural environment, heritage, infrastructure (in terms of transport and access) and agriculture. The report comments on Mandeni's current tourism situation, The Mandeni Municipality is the only coastal municipality that is closest to eThekwini that still maintains its rustic and naturally aesthetic environment. Mandeni is a historically rich Municipal area, which still needs to fully harness the potential of these opportunities. At present the tourism industry in Mandeni is focussed at the Thukela Mouth area and excludes the inland areas. The history of the area cannot be divorced from the tourism potential. The primary factor that attracts tourist in the Municipal area is its beaches, estuaries, natural resources and historical sites, the wild life, Zulu culture. These include the Amatikulu	The Project should aim to address the apparent lack of capacity within the Municipality to deal with Environmental Management issues and the Municipality have no Strategic Environmental Planning and Management tools to inform decision making i.e. EMF, Coastal Management Plan. The Project should aim to look to maintain Mandeni Municipality's rustic and naturally aesthetic environment. Careful consideration needs to be given to any historical site tourism development. Currently, these sites are not well developed nor particularly sustainable. Amatikulu Nature Reserve offers Fishing, nature walks (hiking), bird watching, mountain biking. Canoeing. Siyaya Coastal Plan: A series of "Tourism Opportunities" is identified along the coast, centred on the Prawn Farm area, the mouth of the Amatikulu River, between the Amatikulu River and Thukela Mouth, and at Thukela Mouth itself. In addition, a number of "Tourism Opportunities" are identified around the historical sites inland, including those in the Thukela River Valley. The upgrading of the road link to the Amatikulu Nature Reserve has been identified. Most accessible beaches are recognised as north of the Thukela mouth and Dokodweni. This project is to respond to the number of opportunity spaces that have been identified for further investigation as to their development potential. Moving from north to south, these are: • Prawn Farm – this area is in a highly sensitive environmentally important area, but is disturbed, and forms an important economic generator in the local community. It must be investigated for more appropriate marine or agricultural related use, as it is presently used illegally for the manufacture of animal products. • Prawn Shack – this is the area currently used by the Nkwazi Camp and is an important

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
	Nature Reserve, Ingwenya Nature Reserve, Ndulunde Hills and Ndondakusuka Hill. The report makes the following comment on developing tourism within the area, the historical sites of importance are not developed appropriately and many that have been developed have been vandalised over time. Opportunities exist to capitalise on this uniqueness and capture a different market to that visiting Durban and Ballito. The development status of the tourism sector is very low at the moment, and ventures such as the Military Kraal have not been successful. As such, careful consideration must be given to the type of developments that are being proposed for this area. The report describes present opportunities for Outdoor Recreational and Eco-cultural Tourism activities within Amatikulu Nature Reserve, such as fishing, nature walks (hiking), bird watching, mountain biking and canoeing. The report makes mention of the Amatikulu Nature Reserve Integrated Management Plan 2009-2013, which will need to be looked at. The report makes mention of the Siyaya Coastal Plan and the resulting draft Development Plan and Implementation Plan. In summary the Siyaya Coastal Plan shows the coastline and the river valleys as "Environmental Areas", the area between the coast and the N2 as mainly "Subsistence Agriculture" but with some small areas of "Commercial Agriculture". Thukela Mouth and Wangu are shown as "Secondary Development Nodes". Both of these nodes are identified as suitable for "Residential Infill". A series of "Tourism Opportunities" is identified along the coast, centred on the Prawn Farm area, the mouth of the Amatikulu River, between the Amatikulu River and Thukela Mouth, and at Thukela Mouth itself. In addition, a number of "Tourism Opportunities" are identified around the historical sites inland, including those in the Thukela River Valley. The upgrading of the road link to the Amatikulu Nature Reserve has been identified. The report explains an issue of significance is the need to create safe public beaches of blue flag quality, to serve not only the intended tourists, but more importantly to provide safe bathing facilities for the local population. The proposed summary of priority issues and required action within the coastal implementation plan include; Thukela Mouth and Wangu (Detailed Framework Plans to guide development), Ndondakusuka Military Kraal / Thukela Sites (Call for proposals), Amatikulu Nature Reserve Extension (Detailed investigation report leading to proclamation), Link Road (Route identification), Blue Flag Beaches (Identification of	rustic tourism facility along the coast. It can be retained as a rustic facility, linked to the proposed Dokodweni Beach, and to the more up market facility proposed for south of the Amatikulu River. It provides an important tourism facility catering for a specific experience. Any further development will however be restricted as it is located in a particularly sensitive eco area at the edge of the estuary. • Long term opportunity space – this has been identified on a spur from which there are good vies of the coastline. It could be considered for a resort / hotel type complex in due course. • Amatikulu Nature Reserve – this is one of the most important facilities along the coast and is proposed to be expanded. This creates an opportunity for a significant, five star standard, flag - ship type development, catering for international tourists, as it is in a magnificent location, is easily linked to the N2 and is in very close proximity to the new airport. • Thukela Mouth – there is little opportunity for a significant beachfront resort type development at Thukela Mouth. It is therefore proposed that an area just north of the village be released for the development of a resort, with functional linkages to the village, the new town centre and the other development proposed along the Thukela River. • Thukela River – there are three proposals in the pipeline for development on privately owned land along the north bank of the Thukela River. These applications are to be welcomed as they may well serve as catalysts for further development in the area, however they must be aligned with the planning for the Siyaya Coast, and cannot be formally supported until there is certainty that the Siyaya Coast Development Plan can be implemented as proposed by the Municipality. • Historical sites – The historical sites at Mangete, Ndondakusuka Hill, Fort Tenedos, Fort Pearson and the Ultimatum Tree all present unparalleled opportunities for tourism related development, with the central feature being Ndondakusuka Hill which is the site of the Military Kraal which represents the Zulu social system which was the cause or excuse for the Anglo – Zulu War. It is therefore also an important opportunity space for a central catalytic development which attracts tourism into the area, and from where is can radiate out to the other nearby sites. The proposed summary of priority issues and required action within the coastal implementation plan include; • Thukela Mouth and Wangu (Detailed Framework Plans to guide development), • Ndondakusuka Military Kraal / Thukela Sites (Call for proposals), • Amatikulu Nature Reserve Extension (Detailed investigation report leading to proclamation), • Link Road (Route identification), • Blue Flag Beaches (Identification of suitable swimming beaches), • Opportunity Spaces (Call for proposals),

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Document Title & Description	Summary & Overview	Key Factors to consider for The Project
	suitable swimming beaches), Opportunity Spaces (Call for proposals), Land Use Management System (Inclusion of Siyaya Development Plan into Municipal LUMS (including Coastal Zone Management)).	• Land Use Management System (Inclusion of Siyaya Development Plan into Municipal LUMS (including Coastal Zone Management). Cultural Heritage Values identified: • The link to John Dunn, the "white Zulu" • The battle of eNdondakusuka • The battle of Thukela • The Ultimatum Tree and the Anglo-Zulu War • The leper Colony
2.23 **Mandeni Local Municipality Spatial Development Framework**		***This document is currently under review by Black Balance, and has yet to be circulated to HSSA for review***

3.   INSTITUTIONAL STRUCTURING REVIEW

The aim of this section is to review the existing structures and organisations within the tourism sector from National Government through to Local Government, including understanding of the role of communities and the private sector in tourism development and management.   This section will provide an overview of tourism management from national (macro) to district and local levels (micro) leading to a focus on Mandeni Local Municipality, as well as the greater iLembe District Municipality and the organisations that have tourism related functionality.   All of which, will be analysed within the context of their relevance to the Tourism Strategy Review and research on establishment of a municipal tourism information centre and museum for Mandeni Local Municipality.

According to the White Paper on the Development and Promotion on Tourism (1996), institutionally, the responsibilities associated with carrying out the tourism mandate lie with:

- Government (national, provincial and local departments);
- Statutory body (national, provincial and local tourism organisations).

The government's responsibility is largely one of policy-making, planning and facilitation but it can also implement strategies and carry out specific tourism development programmes.   The existing national tourism organisation (SAT) is mainly responsible for international marketing and promotion of South Africa as a destination.   However, such statutory bodies such as the National Department of Tourism (formerly DEAT and now NDT) and provincial agencies often carry out a more proactive and developmental role in the tourism sector, undertaking research, product development, training and other functions in addition to marketing and promotion.

Research and quality control are carried out either by the government or the statutory body depending upon the strength and capability of the respective organisations.   These activities are sometimes also carried out by a private sector body or organisation, appointed by government of the statutory organisation.

3.1.   REVIEW OF EXISTING INSTITUTIONAL STRUCTURES – MACRO TO MICRO LEVEL

The table below illustrates the roles and responsibilities of government and the private sector in tourism industries. This table has been developed using primary research of the different institutions, legal documentation e.g. the White Paper on Development and Promotion of Tourism in South Africa.

Table 2: Existing Institutional Structures

Institution	Roles and Responsibilities
National Government	National government will play the following key roles in the development and promotion of the tourism sector: • Policy and strategy • Facilitation and implementation • Coordination • Regulation and monitoring • Development promotion • Facilitation and implementation • Establish a safe and stable political and economic environment for tourism to flourish; • Ensure the safety and security of residents and visitors facilitate and provide appropriate incentives for private sector investment in tourism; • Establish and facilitate enabling and appropriate legal and fiscal frameworks for the industry; • Facilitate the development of a tourism culture in South Africa and the supply of skilled manpower for the industry; • Promote tourism as a national priority; • Formulate, monitor and update a national tourism policy and strategy, in collaboration with relevant stake-holders; and • Facilitate the sustainable and responsible development of the tourism industry, by formulating appropriate development guidelines and regulatory measures; establish and maintain standards of facilities and services
National DMO **(South African Tourism)**	The organisation will have overall responsibility for policy support marketing, research, development, standards and promotion. International marketing should mainly be the responsibility of the national tourism organisation. However, marketing and promotion plans for South Africa as a whole should be developed jointly with the provinces and the private sector. In particular, SAT should achieve the following objectives as the National DMO: • Position South Africa as a leading tourist destination and also increase its market profile as a preferred tourist destination both within Africa and the world tourist markets; • Develop and implement marketing initiatives and campaigns aimed at increasing the market share of South Africa within the African and overseas tourist markets; • Provide maximum marketing exposure of products within identified areas most populated by previously disadvantaged groupings; • Facilitate the generic marketing of the provinces' diverse tourism products; • Create market platforms for marketing of these products; • Collaborate on efforts of penetrating the Domestic market in South Africa; • Enhance tourism awareness within the province aimed at mobilizing in particular the untapped domestic markets; • Facilitate the increase of financial and human resource capacity to market South Africa; • Plan and review provincial marketing initiatives; • Ensure on-going communication with Provincial Tourism Associations (PTA's); • Evaluate overall performance of marketing efforts at least annually; and • Co-ordinate with other parallel initiatives marketing South Africa.

Institution	Roles and Responsibilities

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.
	
	The National Department should work closely with the province's DMO and municipalities to:
	
	• Implement national principles, objectives and policy guidelines as is appropriate to local conditions;
	
	• Deliver on legislative and statutory obligations;
	
	• Develop Provincial Tourism Policies and support municipalities in developing local tourism policies;
	
	• Public sector co-ordination to ensure an Integrated Tourism Development approach;
	
	• 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;
	
	• Develop a master plan for tourism that sets out the key strategic objectives and the plan to achieve these objectives;
	
	• Facilitate the development of market - driven products and services, in response to the DMO's market intelligence;
	
	• Investment facilitation through existing provincial and local agencies;
	
	• Spatial development co-ordination;
	
	• Quality Assurance;
	
	• Registration of tourism businesses;
	
	• Registration of tourist guides;
	
	• Champion, monitor, evaluate and report on transformation, and in particular on BBBEE; and finally to
	
	• Play a prominent role in tourism development activities such as:-
	
	   - The involvement of local communities;
	
	   - Environmental management;
	
	   - Safety and security of visitors

Provincial 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.
	
	Roles and Responsibilities include:
	
	• Develop the tourism brand for the province;
	
	• Develop a Domestic Plan strategy;
	
	• Develop and agree the international marketing strategy and programmes with SAT;
	
	• Market and promote the province in competition with other provinces;
	
	• Align provincial marketing strategy and programmes to SAT's programmes;
	
	• Execute provincial initiatives in markets province develops independently and where National presence is non-existent;
	
	• Support municipal DMO's to:
	
	   - Develop marketing strategies;
	
	   - Identify market-driven experience offerings;
	
	   - Linking previously disadvantaged product and services providers to tourism markets;
	
	   - Provide implementation support in pursuit of destination marketing and develop experiences
	
	   - Co-ordinate marketing initiatives with private sector partners and other relevant stakeholders;
	
	   - Undertake Destination Development Planning – to inform the development of the province's experience offerings based on market intelligence;

Institution	Roles and Responsibilities
	- Create a Tourism Knowledge Management system based ongoing research • Monitor and report on Tourism growth in the province;
District Municipality	Integrate provincial tourism objectives into District plans and priorities; Drive the development of and implementation of local tourism policy; Urban and rural planning and development of tourism products and services; Budget for the effective implementation and growth of tourism in line with the Provincial objectives; Allocate Institutional capacity and dedicated and skilled human resources to perform tourism functions; Provision and maintenance of tourist services, sites and attractions and public services; Provision of local infrastructure; Creation and co-ordination of tourism experience routes across its district and beyond municipal boundaries; market and promote specific local attractions; and Provide tourism support to entrepreneurs and investors.
Enterprise iLembe	Enterprise iLembe is the Economic Development Agency for the iLembe District Municipality responsible for Trade & Investment Promotions and Local Economic Development in the region. The Enterprise iLembe vision is to make iLembe District the Investment Destination of Choice. The economic sectors that constitute the pillars of iLembe's economy include agriculture, manufacturing, tourism and commerce.
Local Municipalities	The iLembe District Municipality comprises of four local municipalities, namely; KwaDukuza, Ndwedwe, Mandeni and Maphumulo Local Municipalities.
The Private Sector	The private sector should own tourism product and therefore is the main driver of the tourism economy. The private sector is not only the large established players. In fact it is mainly made up of medium, small and micro businesses. It is the partner that views the tourism master plan and the experience profile of the province, thereby gaining an understanding of the market opportunities. It is important for the private sector to be organised in order to be able to pursue a dialogue with government and public entities, provide a co-ordinated input into the tourism partnership, and also to develop for itself, a bench mark. In organising themselves, it is critical that the traditional divisions of the past are eliminated and a united business sector emerges. The racial, size and geographically defined approach to associations merely serve to entrench the divisions, and dilutes the impact the sector could have in growing tourism, and also in pursuing the transformation objectives. It is recommended that the DMO establishes a Provincial Tourism Private sector forum to co-ordinate communication and grow tourism in KZN for the benefit of all. The private sector's roles and responsibilities include: • Investing in tourism plant and service provision; • Developing the tourism product, including marketing; • Packaging the tourism experiences; • Operating and managing tourism businesses; • Providing hospitality and other tourism related services; • Creating jobs and training personnel; and • Being the agents of transformation by supporting the entry of other players – whether small, medium or large.
Role of Communities	The Tourism White Paper supports and promotes the principle of "community based" tourism. To deliver on this the role of communities is to: • Encourages tourists to visit the destination and experience what it has to offer, thus benefiting the community economically; • Encourage and develop ways in which a community can be more aware of, and skilled, in tourism, so that members of the community treat tourists correctly; • Ensure as custodians of local tourism that the right kind of market-driven and sustainable tourism infrastructure is developed and effectively managed in its locality – this includes, attractions, accommodation, roads and shops for tourists; • It is necessary for communities to be organised into Community Tourism Organisations (CTO) to enable it to provide a co-ordinated point of dialogue and negotiations, lobby effectively, build capacity, leverage opportunities; and derive the true benefits of tourism; • The CTO must be representative of all people in the community. It must be autonomous. It must be ensured that the CTO focuses on being truly representative of the communities, and not take on the role of DMO or a "for profit" role. This will distract from its community mandate, and may result in benefiting a few rather than the community at large

Institution	Roles and Responsibilities
	• Be in touch with and have input into local planning, with for example the IDPs, LEDs, and the Provincial Tourism Master plan; • Be part of the process when projects are agreed, this includes but not limited to, rejuvenation projects, poverty alleviation projects, and capacity building projects; and • Champion compliance of BBBEE objectives.
The Media	Tourism operates in a global environment, the messages we communicate serves to either grow our tourism market share or negatively impact on it. The South African Editors' Forum (SANEF) developed a set of principles which to a large extent informs the role of media in Tourism. The tourism sector looks to the media to: • Be a representative and credible partner in society; • Provide responsible reporting on the destination; • Create awareness of importance of tourism to all citizens of the province; • Objectively promote the province; and • Provide educational and informative tourism coverage.
Tourism Grading Council	The Tourism Grading Council of South Africa (TGCSA) is the only officially recognised quality assurance body for tourism products in South Africa. TGCSA grades Hotel, B&B, Guest House, MESE (Meetings, Exhibitions and Special Events) Venues. Being graded benefits establishments as follows: • Not only being recognised for quality assurance but also gives establishments valuable strategic marketing linkages and benefits in saving on search engine optimisation; • Graded establishments are recognised by South African Tourism and provincial tourism authorities; • Graded establishments are able to tap into the rewards of the multi-billion rand government business. All government officials are legally obliged to use TGCSA Graded Establishments – so if it doesn't have stars, it's not 'Government-friendly',
Community Tourism Organisation	A CTO is a publically formed entity that works with local and district municipalities, province and national in order to grow tourism within their area.

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3.2. INTERACTION WITH RELEVANT ORGANISATIONS

3.2.1 SOUTH AFRICAN TOURISM (SAT)

SAT is the official marketing organisation of South Africa as a tourist destination. SAT's role is to market South Africa's scenic beauty, diverse wildlife, cultures and heritages, sport and adventure opportunities, eco-tourism and conference facilities. SAT's marketing is undertaken via SAT international offices in strategic travel markets worldwide (London, Paris, Tokyo, New York, Sydney, Beijing, Mumbai etc). It participates in travel shows, presents workshops for members of the travel trade and produces a variety of promotional material. SAT also initiates and coordinates marketing campaigns to create a positive marketing climate for the effective marketing of South Africa's tourism products. SAT, for this purpose, organises INDABA, the largest annual tourism market in Africa as an opportunity for the South African travel industry and SAT members to present its products to the international market.

3.2.2 KWAZULU-NATAL TOURISM AUTHORITY (TKZN)

At a provincial level, tourism responsibility falls under the provincial Department of Economic Development and Tourism (DEDT), and the provincial tourism authority, Tourism KwaZulu-Natal (TKZN)

TKZN is responsible for the development, promotion and marketing of tourism for the KZN province. The Authority's statement of intent and direction is drawn from the mandate vested in the Organisation by the KwaZulu-Natal Tourism Act, 1996 (as amended, including No. 2 of 2002). TKZN is a Destination Management Organisation (DMO). Prior to 1994, tourism marketing was a function of national government. However, following the installation of a democratic national government in that year, this responsibility was devolved to the provinces. Provinces are now responsible for both tourism product development and the marketing of their regions both domestically and internationally. At the national level the NDT utilises SAT as its marketing arm with its role to market the country generically to international markets.

The KwaZulu-Natal Tourism Act 1996 (as amended 2002) confers specific powers and responsibilities on the KZN Tourism Authority (TKZN). Key functions include:

- Facilitate safe and stable political and economic environment for tourism to flourish
- Working closely with DMO and other provincial municipalities, TKZN's functions include:
- Market and promote the province;
- Align provincial marketing strategy and programmes to SAT;
- Development of a tourism brand for the province;
- Development of a domestic brand strategy for the province;
- Development and agree an international marketing strategy and programmes with SAT;
- Execute provincial initiatives in markets that KZN develops independently;
- Support district and local DMOs to develop marketing strategies;
- Identify market-driven experiences;

- Link Previously Disadvantaged Individuals (PDIs) to tourism markets and implement marketing programmes;
- Coordinate marketing initiatives with private sector partners and other stakeholders;
- Destination development planning;
- Tourism knowledge management;
- Monitor and report on tourism growth in the province.

TKZN developed an integrated brand strategy for KZN as well as a Tourism Destination Management System, which incorporates an online booking system on the TKZN website in conjunction with the Western Cape and Gauteng Tourism Authority.

3.2.3 ILEMBE DISTRICT MUNICIPALITY (IDM)

The iLembe IDP states that the District and its four Local Municipalities have relatively well established organisational structures and systems in place. All of the Municipalities have appointed Municipal Managers. On-going institutional support around issues of planning, project management and financial management are required within these Municipalities.

The current structure of the IDM is reflected in the diagram below. This structure is considered to be appropriate for the developmental local government mandate assigned to the District Municipality in terms of the Municipal Structures Act, 1998. With this in mind the Municipality's organisational structure provides for four Directorates that are managed by the Municipal Manager. The District Municipality employ 459 staff members and the four Directorates are: Corporate Governance, Finance, Technical Services and Corporate Services.

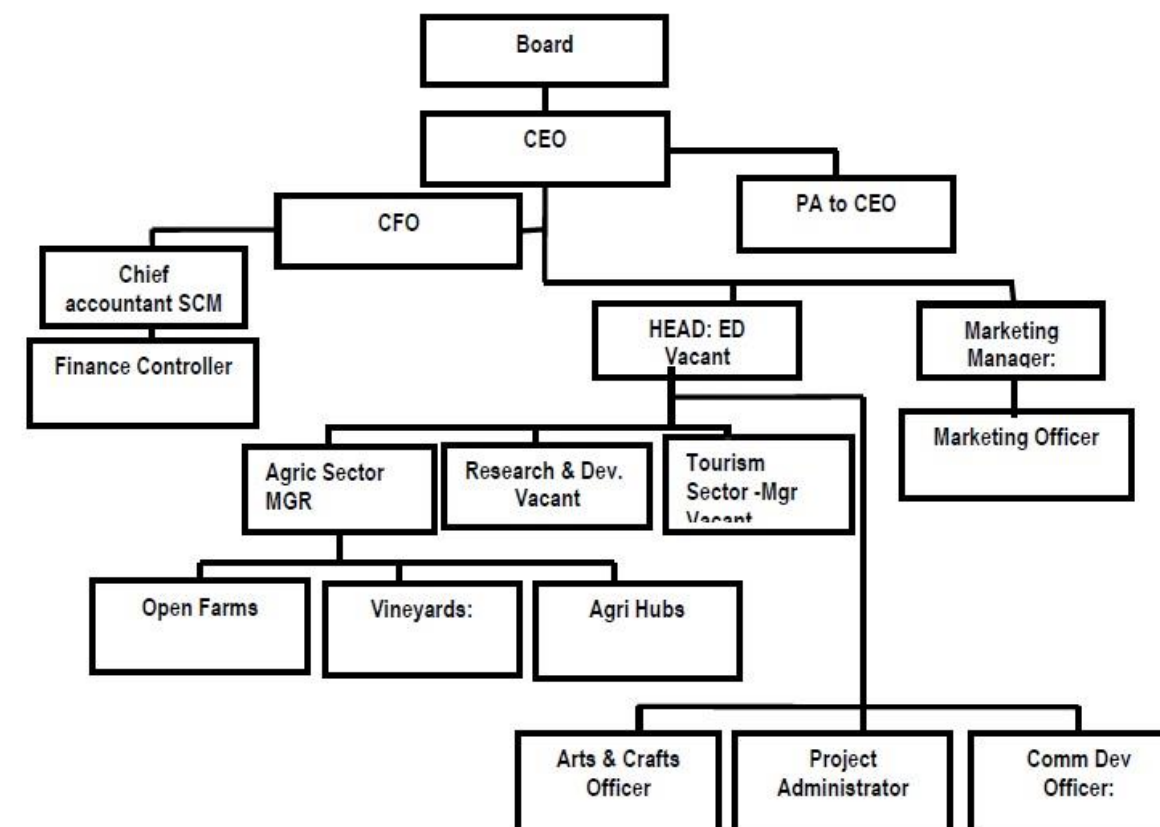**Diagram 1: iLembe District Municipality Organisational Top Structure**
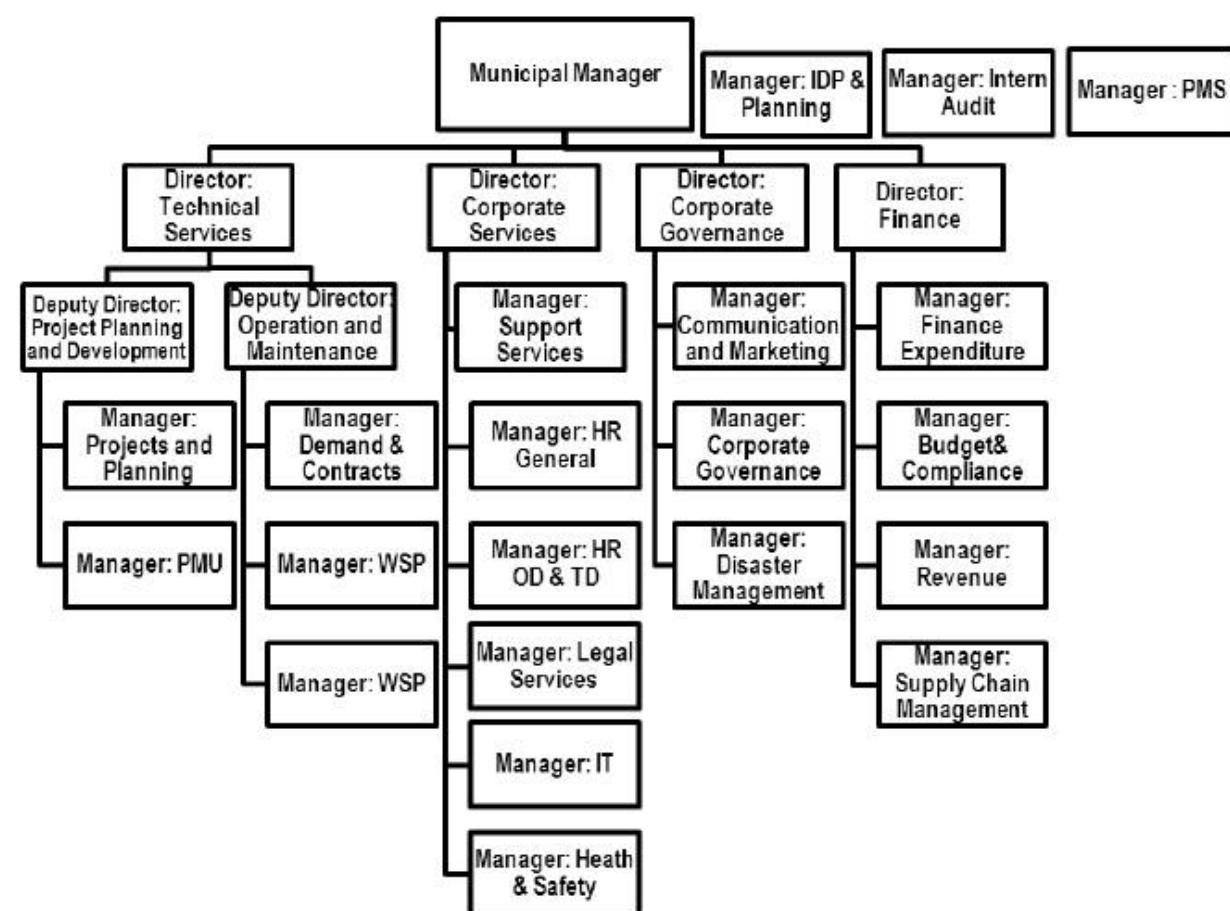
Within the context of this organisational top structure the current status of these positions are all occupied. The organisational structure of the IDM is, however, currently under review.

It would seem, from the diagram that Tourism for the IDM falls within the duties of the Communication and Marketing Manager.

3.2.4 ENTERPRISE ILEMBE (EI) STRUCTURE

Enterprise iLembe (EI) is an economic development agency for the IDM region. The iLembe IDP states that EI is responsible for Trade and Investment Promotions and Local Economic Development in the iLembe region. The EI vision is to make the IDM the Investment Destination of Choice.

Diagram 2: Enterprise iLembe Organogram

The IDM website states that Enterprise iLembe (Pty) Ltd is a private company, which is a municipal entity of the iLembe District Municipality – meaning that all the shares of EI are held by the Municipality. The Municipal Systems and the Municipal Finance Management Acts permit the establishment of a local economic development agency as a possible special purpose organisation to promote the local economy. Examples in South Africa include the Durban Investment Promotion Agency, the Johannesburg Development Agency and many others in more neglected areas of South Africa.

The website further states that LED agencies are special implementation vehicles created by municipalities and other stakeholders to achieve their common objectives. As such it should be remembered that an economic development agency does not make policy, it implements it. The mandate for policy making lies with the elected members of Council, not with the agency. It is the role of the agency to implement the local economic development policy set out in the Integrated Development Plan (IDP). The agency may recommend
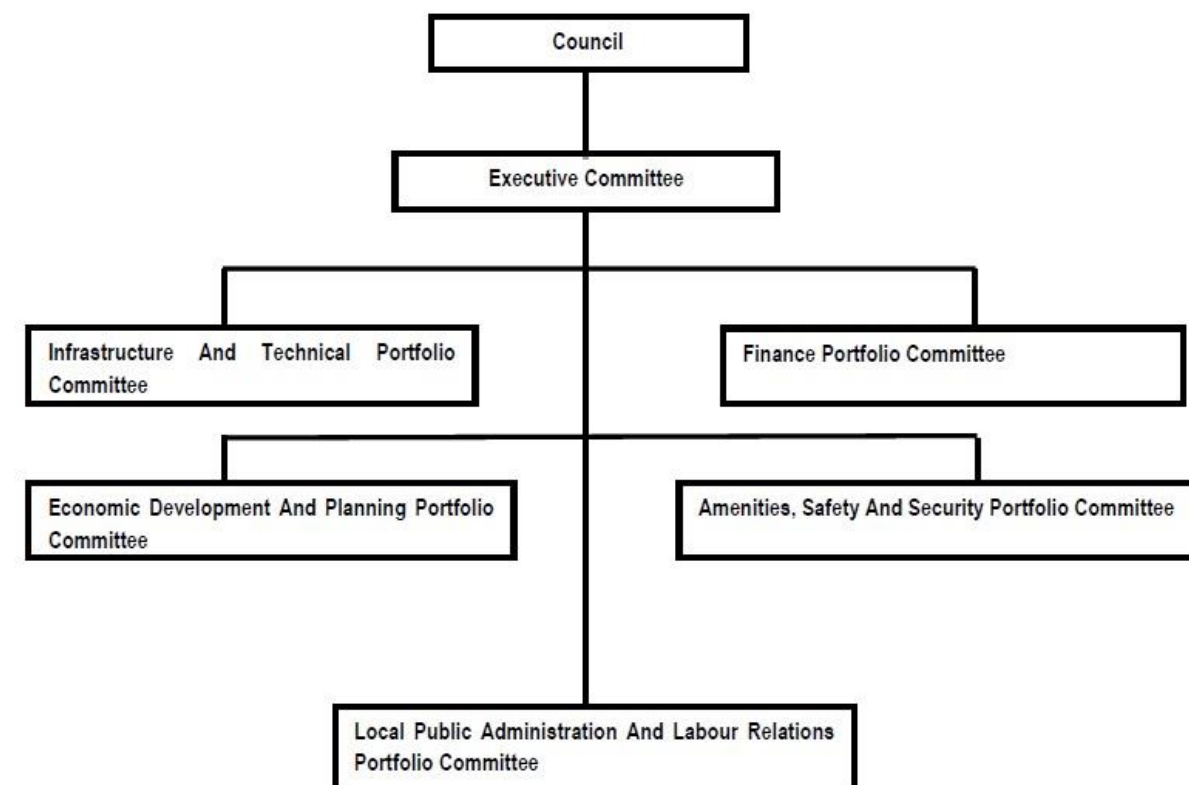
policy to elected members, but it is not mandated to make policy on behalf of those the people of the locality have elected to be their representatives.

It is understood that Tourism forms one of three arms of Economic Development, along with the agriculture sector and research and development. HSSA is to meet with EI to further understand tourism within the district. Once the proposed strategy has been formulated, this will need to be reviewed with EI for their input and incorporation into the District / North Coast tourism planning and marketing.

3.2.5 ILEMBE DEVELOPMENT PLANNING SHARED SERVICES STRUCTURE (DPSS)

The iLembe IDP states that the establishment of the DPSS function is to address the limitations for the development planning function between district municipalities and their constituent local municipalities. The smaller municipalities in the District have limited planning capacity and high turnovers of staff reported. The aim is for municipalities to share services at District level in order to optimize limited resources and thereby enhance the quality of planning and development services provided in these areas.

Diagram 3: iLembe DPSS Structure

3.2.6 DISTRICT MUNICIPALITY COUNCIL STRUCTURE

The iLembe IDP states that the iLembe District Municipality has 5 standing portfolio committees as follows: Infrastructure and Technical; Finance; Economic Development and Planning; Amenities, Safety and Security and Local Public Administration and Labour Relations. All the standing committees have their own programme but reports to Council.
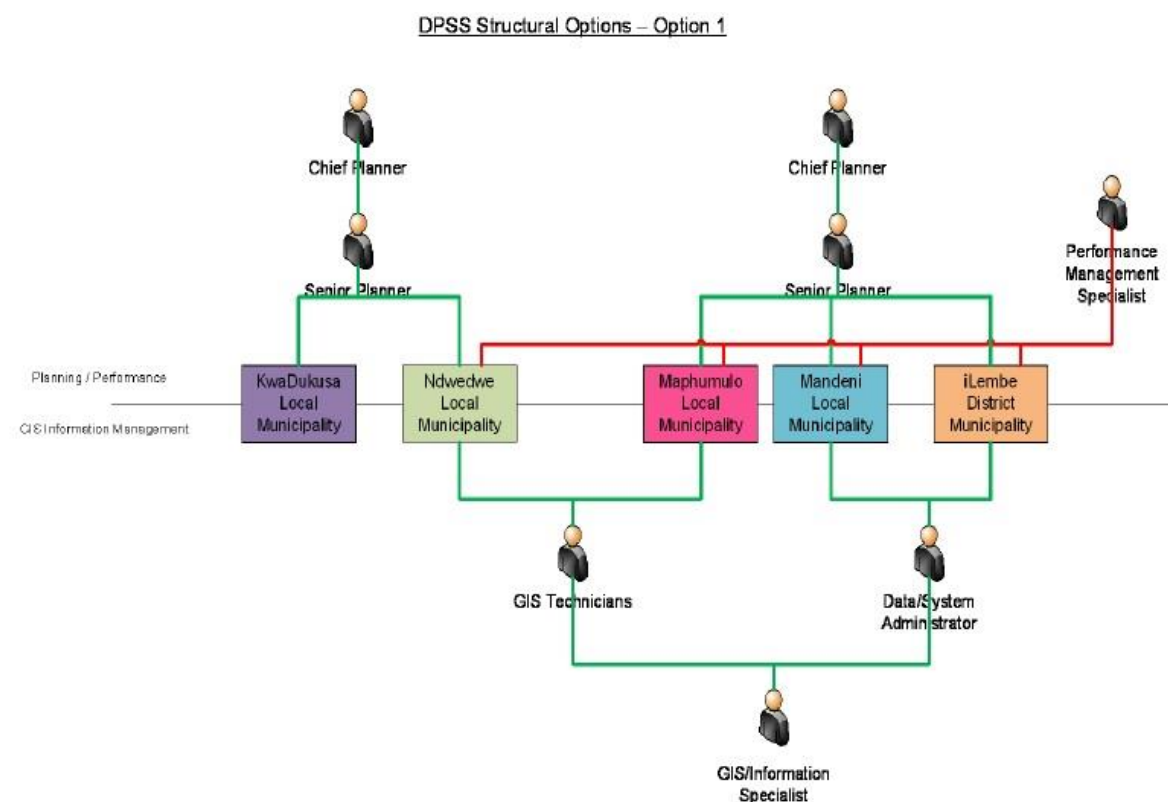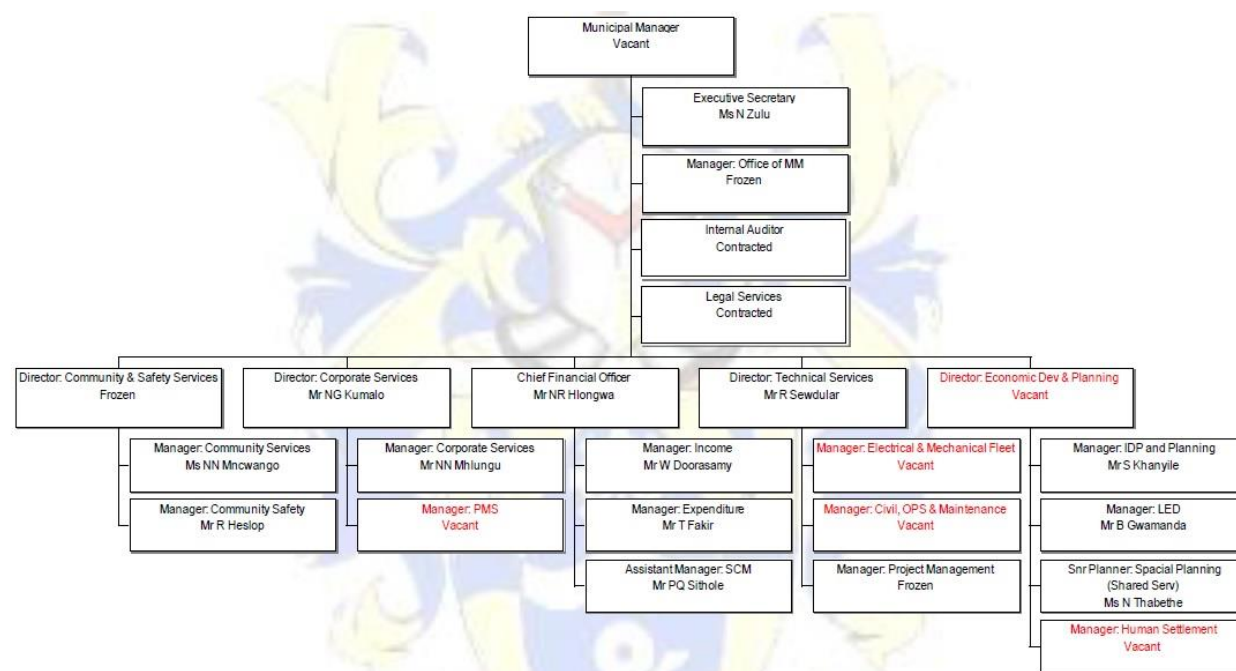
Diagram 4: Council Organogram

3.2.7 MANDENI LOCAL MUNICIPALITY ORGANOGRAM

As per the Mandeni IDP, part of the reviewed organogram includes a new Economic Development & Planning Department. This new strategic business is constituted of four divisions: Strategic Planning, Spatial Planning, Local Economic Development & Human Settlement.

It is understood that tourism would fall within the Local Economic Development Department.

Diagram 5: Mandeni Local Municipality Organogram

3.2.8 MANDENI LOCAL ECONOMIC DEVELOPMENT CAPACITY

Tourism falls within Local Economic Development (LED). And as such it is important to understand Mandeni's LED capacity. The Mandeni LED Strategy states that the LED function falls within the Economic Development and Planning Directorate. While the mandate of this department covers municipal planning generally, LED is a programme within the Department. It falls under the LED Manager, and includes the following

- Local economic development strategic planning which includes preparation and review of economic development sector plans.
- Packaging and implementation of LED projects.
- Local Economic Development (Tourism, Business Licensing and SMMEs Development, Agriculture, Manufacturing).
- Participation in provincial and district LED initiatives.
- Developing and maintaining functional relationship with key stakeholders in the LED space.

The Mandeni LED Strategy further states that despite LED being recognized as an important function, very little resources are allocated to undertake LED effectively within the municipal area. The Department has only 3 staff members including the director. Mandeni Municipality organizational structure is being reviewed as a means to enable the municipality to perform its functions efficiently and effectively.

In addition, the municipality has identified a need for an LED learnership program which seeks to create capacity within the municipal area and facilitate effective implementation of the LED projects. However, LED is a relatively new mandate for the municipality and a continuously evolving practice. As such, it is critically important to expand technical expertise through continuous training, networking and partnership with support organizations.

3.2.9 THUKELA MOUTH COMMUNITY TOURISM ORGANISATION

As per Mandeni's Led Strategy 2007, the CTO office is currently located in the Thukela Mouth area. The Strategy reports that although the Thukela Mouth is the Municipal area's flagship tourism area, the CTO is not managed exclusively by the Thukela Mouth tourism stakeholders. There is a need for broader and more inclusive representation on the CTO and within the Municipal area of jurisdiction.

As per the 2008 Tourism Strategy, the Thukela Mouth Community Tourism Organisation was established as a means of harmonizing the efforts of tourism stakeholders in Mandeni Local Municipality. As the only tourism organization in Mandeni Local Municipality, the Thukela Mouth CTO should be supported as much as possible by local government. This includes providing a suitable site at Thukela Mouth from which the CTO can operate a small office. The CTO should also be consulted with and included in all matters concerning tourism in the municipality. Members of the Thukela Mouth CTO have, in fact, voiced concerns that they have been left out of certain tourism planning forums. This problem must be dealt with if the CTO is to effectively fulfil its purpose.

HSSA have not been able to contact the CTO Chair Person, in order to get an updated status on the CTO. HSSA will continue to source this information for the duration of the Project. The CTO did not appear to be represented at the MLM LED Strategy Forum, held on Friday 12th September 2014.

3.3   REVIEW OF LAND OWNERSHIP AND DEVELOPMENT RIGHTS

The Mandeni LED Strategy states that the majority of Mandeni Municipality is made up of four Traditional Authority areas which fall under the Ingonyama Trust Land (ITB). It further states that Traditional Council (TC) areas are generally characterized by subsistence farming activities, harsh topographical conditions and the worst of agricultural potentials with the exception of the Macambini Council which lies along the coast. Large areas are under-utilized with traditional settlement patterns and low densities which are not conducive to the provision of infrastructural services. Smaller rural nodes, such as, Tribal courts, trading stores or clinics are scattered through the TC. Traditional housing dominates, but there is a range of other formal and informal structures proliferating in these predominantly rural areas.

3.3.1   MANDENI LOCAL MUNICIPALITY LAND USE MANAGEMENT

The Mandeni LED Strategy states that until May 2010, land use management within the Mandeni Municipality has been regulated in terms of a plethora of legislation. Most of these have now been repealed, and replaced with the KwaZulu-Natal Planning and Development Act (PDA). The PDA empowers the municipality to introduce systems and procedures for land use management, and take decisions independently. This introduces new challenges for the Mandeni Municipality, and these are:

- Development of a Land Use Management System
- Implementation of a wall-to-wall scheme with uniform land use controls and procedures within five years from May 2010.
- Creating internal capacity to handle an increased volume of applications as the municipality takes responsibility for applications that were previously handles by the provincial government. This is required in order to avoid unnecessary and costly delays.
- Mapping of the process and ensuring that all those involved in the assessment of application and decision making perform their tasks on time, and decisions taken are informed and based on complete information.

The municipality has commenced with the review of the urban scheme to bring it in line with the PDA requirements.

3.4   IDENTIFICATION OF VARIABLES AND RISK ASSESSMENT ASSOCIATED WITH THE PROJECT

Research indicates that a variable is something that can be changed, such as a characteristic or value.

Some of the variables and risk factors that have been identified for the Mandeni Tourism Strategy may include:

- Supply factors (the primary attraction needs to be suitably crafted to fill an actual gap)
- Ingonyama Trust Land
- Possible land claims
- Perceived levels of crime
- Accessibility issues e.g. signage
- Infrastructure related to driving and implementing the tourism strategy
- Tourism, as an independent function of the economy, currently seems to get lost within the greater LED function.
- Water, sanitation and electricity supply to certain areas.
- Erosion of the natural asset base of the area through possible poaching of Wildlife in the Reserve and Coastal Park areas.
- Poor water quality of the Thukela River and estuary.

Summary of Findings Considered Relevant to the Way Forward

- The general institutional framework for MLM is perceived as poor. It does not appear to have the skills capacity / experience necessary to implement and manage the requirements of a tourism strategy.
- The institutional arrangement and relationship between IDM and MLM in terms of developing and marketing tourism activities does not appear to be effective.
- Transformation within the tourism sector appears to be limited. It appears that this is due to the inadequate institutional structuring; both on a local and district level as mentioned above. As such, once the proposed tourism strategy is formulated, the institutional arrangement will need to be restructured to be more effective.
- The effectiveness of the Thukela Mouth CTO cannot be ascertained as HSSA have been unable to contact the CTO directly. However, from the analysis of the current local tourism activities, it would appear to be limited.

4.   **MARKET DEMAND ANALYSIS**

A Market Demand Analysis, as part of the review of the current situational investigations and assessment, has been carried out in order to gain insight and a better understanding of related demand factors that exist within the area of the Project. The primary objective for any market demand analysis is to be able to forecast the potential visitor number projections, segmentation and profiling in order to assess economic factors that can be applied to Project revenue streams. Thereby enabling an assessment of the potential sustainability, economic benefits and job creation for the Project, from a demand-driven perspective.

The demand factors reviewed for the Project include, *inter alia*:

- Understanding of the approximate total market size that may consider using what the Project has to offer;

- Determine the potential market share that the Project may reasonably expect to attract from the total market size;

- In determining the potential total market size the following 3 key visitor source markets are considered;
    - Foreign Tourists
    - Domestic Tourists
    - Residents (day visitors) from with KwaZulu-Natal

- A segmentation analysis is carried out on each of the visitor source markets, into various age categories, which are then applied, by way of usability factors, as a component in determining market share. Potential resident markets are assessed using census and Living Standards Measure (LSM) data;

- Proximity to the Project of the indicative market share is calculated by way of expected travel time in increments of one hour, due to the anticipated fall-off of demand the further the potential visitor is from the Project;

- All visitor data is obtained and assessed from research conducted from a combination of available historic public reports, of which the following represent the most current (2012) source material;
    - Statistics South Africa: Tourism, 2012: Report No. 03-51-02 (2012) -
      http://www.statssa.gov.za/publications/Report-03-51-02/Report-03-51-022012.pdf
    - South Africa Tourism 2012 Annual Tourism Report - 2013 08 01 –
       http://www.southafrica.net/research/en/page/research-reports-search
    - Tourism KwaZulu-Natal 2013 Statistics of our Tourism Sector
      http://www.zulu.org.za/archive/catalogue-of-kwazulu-natal-tourism-authority-research-reports-F57976
    - Statistics South Africa: Census 2011: P0301.4
      http://www.statssa.gov.za/publications/P03014/P030142011.pdf
    - South African Audience Research Foundation: Living Standards Measure (LSM)
      http://www.saarf.co.za/LSM/lsms.asp

- Contents of the above documents are not duplicated within this report, as it is assumed these may be accessed on-line at the reader's discretion. The contents below, therefore, set out the findings and summaries of the assessment and analysis carried out on the available source material.

Market demand research, for a Project of this nature, involves numerous dynamics, variables and assumptions having to be assessed in the compilation of the data. It should not be considered as an 'exact science', nor can the results be guaranteed, due to the extent of past, present and future unknowns, as well as having to rely on base market data that is several years old that was not prepared with the specific Project in mind. It does, however, provide an indicative understanding of potential visitor number projections, sources, trends, needs and so on that may be interpreted for guidance in the development planning and operations of the Project. It is recommended that ongoing market research should be conducted both prior to and during the operational lifetime of the Project.

The market demand analysis is also founded on the premise that an appropriate level of 'quality of product', as well as 'quality service standards', shall be available at the Project. The combination of these factors results in a potential set of scenario projections, which can then be tested by adjustment to one or more of the variables.

4.1   **ASSUMPTIONS RELATIVE TO MARKET DEMAND PROFILING**

1.   **Local Resident Population Market**

It is assumed that this market predominantly comprises LSM's 7 to 10 residents from areas in KwaZulu-Natal that are within a one-hour travelling distance. It is anticipated that this market would also account for the largest portion of visitors. Lesser market share is expected to be captured from areas beyond one-hour travelling time.

2.   **Domestic Tourist Market**

This market predominantly comprises domestic tourists that choose to visit KwaZulu-Natal from all over South Africa. Either to stay within Mandeni, or staying in the surrounding areas within a one-hour travelling distance. Lesser market share is expected to be captured from areas beyond one-hour travelling time.

3.   **Foreign Tourist Market**

This market will comprise foreign tourists that either choose to stay within the Mandeni area, or are staying in the surrounding areas and/or passing through the area en-route to another destination.

4.   **Age Segmentation**

In order to create consistency within the market segmentation categories for each of the 3 core markets referred to in items 1, 2 and 3 above, including alignment with the census data and LSM, the various age segmentation terminologies have been assimilated into the following categories:

USCT: MULTI ACTIVITY TRAILS - CONCEPT AND DEVELOPMENTAL PLAN
DRAFT PHASE 1 REPORT: SITUATIONAL ANALYSIS & INITIAL FEASIBILITY STUDY

MARKET DEMAND ANALYSIS

- Adults – 15-years and older:
  - Young Singles (approx. 15 to 29)
  - Mature Singles (approx. 30 to 54)
  - Young Couples (approx. 15 to 29)
  - Mature Couples (approx. 30 to 54)
  - Mature Singles & Couples (approx. 55 to 74)
  - Young Families with Children (0 to 4)
  - Mature Families with Children (5 to 14)
- Children from 0 to 14-years of age:
  - Children from 5 to 14-years of age

5. **Seasonality**

As with most destinations around the world, South Africa and KwaZulu-Natal are confronted by their own issues of seasonality when it comes to both domestic and foreign arrivals (SAT, 2012:73).

The domestic travel trends, or patterns, tend to be determined by school, religious and traditional holidays. There are strong peaks at the end of the year over December and January as well as around Easter.

When it comes to foreign arrivals, these differ depending on the region and are generally driven by market-specific and traditional holiday patterns. Foreign arrivals, from overseas, are largely VFR arrivals, with visitors following the pattern of making bigger, longer trips during the European Winter. As a result, there tends to be a strong peak in arrivals beginning in October with numbers tailing off at the end of February.

Figures over the years have shown that South Africa's lowest month for foreign overseas visitor arrivals is usually June. Seasonal patterns have serious implications for product owners and transport operators in terms of their business profitability and job sustainability. There is, therefore, a need to factor in costs and investments with total annual revenues as opposed to monthly ones.

In an attempt to address issues of seasonality, it is suggested that efforts should be made to attract those market segments that are not as seasonally dependent, in order to try to extend the seasons and reduce the gap between the high and low seasons. Other market segments for example, could be attracting conference groups and weddings for low season and/or mid-week visits/ bookings.

Moreover, one should note that weekends and public holidays are considered to be higher peak than weekdays. Attempts need to be made to attract weekday visitors. Corporate functions are a potential example of potential way in which to increase weekday visitor numbers.

Interestingly enough for the Project, whilst domestic tourism tends to be largely seasonal; in comparison day trips are not as seasonal. Excluding December, when there is a large rise in the incidence of day trips, throughout the rest of the year there are no clear peaks or troughs

MODEL H provides the projected seasonality assessment for the Project:

H. MANDENI TOURISM STRATEGY REVIEW
VISITOR NUMBERS SEASONALITY PER CORE MARKET

Months	Foreign Tourists	Domestic Tourists	Residents	Totals	%'s
Jan	1,133	6,140	5,903	13,176	7.41%
Feb	1,006	5,104	4,906	11,016	6.20%
Mar	1,260	7,647	7,353	16,260	9.15%
Apr	1,008	9,860	9,484	20,352	11.45%
May	880	6,419	6,172	13,471	7.58%
Jun	1,132	5,886	5,660	12,678	7.13%
Jul	1,008	7,604	7,312	15,924	8.96%
Aug	1,005	5,025	4,835	10,865	6.11%
Sep	1,007	7,267	6,990	15,264	8.59%
Oct	880	7,185	6,905	14,970	8.42%
Nov	880	5,068	4,876	10,824	6.09%
Dec	1,379	11,009	10,580	22,968	12.92%
Totals	**12,578**	**84,214**	**80,976**	**177,768**	**100.00%**

4.2   INDICATIVE VISITOR NUMBER MODELLING AND PROJECTIONS FORMULATED ON 2012 BASE DATA

MODEL A represents an assessment of the foreign tourist visitor market from total arrivals in South Africa, through to the assumed number and segmentation of foreign visitors making up the total market size relative to the Project.

A. MANDENI TOURISM STRATEGY REVIEW   22/10/14 11:32
VISITOR PROFILING / NUMBER PROJECTIONS - BASE DATA

FOREIGN TOURIST VISITOR PROFILES			TRAVEL TIME TO PROJECT		
Data analysed from SATS, STATSSA & TKZN 2012 reports	**%**	**NUMBERS**	**< 1 hour**	**1 hour - 2 hours**	**> 2 hours**
Foreign Tourism Growth per year presumed at	10.87%				
Foreign Tourists to South Africa (2012)		**13,795,530**			
Deduct following categories of Foreign tourists due to non-applicability of activities with Project					
DEDUCT NON & 1-DAY VISITORS		-4,607,162			
DEDUCT NON-LEISURE VISITORS		-6,676,298			
Resulting Foreign Leisure Tourist Market to SA		**2,512,070**			
Assumption based assessment of foreign leisure tourists visiting KZN					
Assumed number of foreign leisure tourists that may make up market demand availability & proximity for Project from within KZN *(% = Market Share of SA)*	12.35%	**310,308**	**80,680**	**93,092**	**136,536**
Note: Data for proximity location of foreign tourists to Project area was not found therefore assumed factoring has been used for the purpose of this calculation.			*26%*	*30%*	*44%*
Assumed to be broken down into market segments as follows					
Children 0-4	2.30%	7,137	1,856	2,141	3,140
Children 5-14	2.70%	8,378	2,178	2,513	3,686
Young Singles (approx. 15 to 29)	11.25%	34,910	9,077	10,473	15,360
Mature Singles (approx. 30 to 54)	12.70%	39,409	10,246	11,823	17,340
Young Couples (approx. 15 to 29)	14.65%	45,460	11,820	13,638	20,002
Mature Couples (approx. 30 to 54)	17.05%	52,908	13,756	15,872	23,279
Mature Singles & Couples (approx 55 to 74)	19.35%	60,045	15,612	18,013	26,420
Young Families with Children (0 to 4)	6.30%	19,549	5,083	5,865	8,602
Mature Families with Children (5 to 14)	13.70%	42,512	11,053	12,754	18,705
Total Available Foreign Market	**100.00%**	**310,308**	**80,680**	**93,092**	**136,536**

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MODEL B represents an assessment of the domestic tourist visitor market from total arrivals in KwaZulu-Natal, through to the assumed number and segmentation of foreign visitors making up the total market size relative to the Project.

B.   MANDENI TOURISM STRATEGY REVIEW   22/10/14 11:33
VISITOR PROFILING / NUMBER PROJECTIONS - BASE DATA

DOMESTIC TOURIST VISITOR PROFILES	%	NUMBERS	TRAVEL TIME TO PROJECT		
Data analysed from SATS, STATSSA & TKZN 2012 reports	**%**	**NUMBERS**	**< 1 hour**	**1 hour - 2 hours**	**> 2 hours**
Domestic Tourism Growth per year presumed at	-1.28%				
Domestic Visitor Trips to KZN (2012)		**6,096,000**			
Deduct Business & Other	6.00%	-365,760			
Number of trips to KZN defined as "Holiday"	94.00%	5,730,240	1,661,770	2,062,886	2,005,584
Note: Data for proximity location of domestic tourist trips to Project area was not found therefore assumed factoring has been used for the purpose of this calculation.			29%	36%	35%
Number of trips to KZN defined as "VFR"	80.00%	4,876,800	989,990	1,638,605	2,253,082
Note: Data for proximity location of VFR domestic tourist trips to Project area was not found therefore the same % factoring for KZN residents has been used for the purpose of this calculation.			20.3%	33.6%	46.2%
Assumed portion of VFR domestic tourist trips that may make up market demand availability in the Project calculated from LSM 7 to 10 per Resident Analysis percentages	29.43%	1,436,478	291,314	482,174	662,990
Assumed number of domestic leisure trip tourists that may make up market demand availability & proximity for the Project	14.00%	853,440	671,779	424,282	-247,498
Assumed number of domestic VFR & leisure trip tourists that may make up market demand availability & proximity for the Project		**2,285,041**	**963,093**	**906,456**	**415,492**
Assumed to be broken down into market segments as follows					
Children 0-4	11.89%	271,802	114,558	107,821	49,422
Children 5-14	20.66%	472,170	199,009	187,306	85,855
Young Singles (approx. 15 to 29)	20.87%	476,968	201,031	189,209	86,728
Mature Singles (approx. 30 to 54)	9.14%	208,943	88,065	82,886	37,992
Young Couples (approx. 15 to 29)	4.47%	102,076	43,023	40,493	18,561
Mature Couples (approx. 30 to 54)	4.60%	105,210	44,344	41,736	19,131
Mature Singles & Couples (approx 55 to 74)	9.04%	206,526	87,046	81,927	37,553
Young Families with Children (0 to 4)	6.26%	142,996	60,270	56,725	26,001
Mature Families with Children (5 to 14)	13.06%	298,349	125,748	118,353	54,249
Total AvailableDomestic Market	**100.00%**	**2,285,041**	**963,093**	**906,456**	**415,492**

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USCT: MULTI ACTIVITY TRAILS - CONCEPT AND DEVELOPMENTAL PLAN
DRAFT PHASE 1 REPORT: SITUATIONAL ANALYSIS & INITIAL FEASIBILITY STUDY

MARKET DEMAND ANALYSIS

MODEL C represents an assessment of the resident visitor making up the total market size relative to the Project.

C.   MANDENI TOURISM STRATEGY REVIEW   22/10/14 11:34
RESIDENTS VISITOR PROFILING / NUMBER PROJECTIONS - BASE DATA

RESIDENT VISITOR PROFILES			TRAVEL TIME TO PROJECT		
Data analysed from LSM & CENSUS 2011 data	**%**	**NUMBERS**	**< 1 hour**	**1 hour - 2 hours**	**> 2 hours**
Population Growth per year presumed at	1.15%		20.3%	33.6%	46.2%
Total Resident Population of KZN per District Municipality - Assumed LSM's 1 to 10	**100.00%**	**10,267,301**	**2,082,504**	**3,446,286**	**4,738,512**
AmaJuba	4.87%	499,839	0	0	499,839
eThekwini	33.53%	3,442,361	860,590	1,893,299	688,472
iLembe	5.91%	606,809	606,809	0	0
Sisonke	4.49%	461,419	0	46,142	415,277
Ugu	7.04%	722,484	0	180,621	541,863
uMgungundlovu	9.91%	1,017,763	101,776	305,329	610,658
uMkhanyakude	6.10%	625,846	0	125,169	500,677
uMzinyathi	4.98%	510,838	0	0	510,838
uThukela	6.51%	668,848	0	0	668,848
uThungulu	8.84%	907,519	272,256	453,760	181,504
Zululand	7.83%	803,575	241,073	441,966	120,536
Deduct LSM's 1 to 6	70.57%	-7,246,056	-1,469,708	-2,432,185	-3,344,162
Assumed Total Available Market from KZN Resident Population: LSM's 7 to 10	**29.43%**	**3,021,246**	**612,796**	**1,014,101**	**1,394,350**
made up of age segments as follows					
0-4	11.67%	352,562	71,510	118,340	162,712
5-14	20.27%	612,466	124,226	205,578	282,662
15-54	57.30%	1,731,077	351,112	581,047	798,918
55-74	8.87%	267,891	54,336	89,919	123,636
>75	1.89%	57,250	11,612	19,216	26,422
Deduct >75	-1.89%	-57,250	-11,612	-19,216	-26,422
Totals Used for Market Segmentation Analysis	**100.00%**	**2,963,996**	**601,184**	**994,884**	**1,367,928**
Conversion of KZN Census / LSM data to Available Market Segments for Project					
Children 0-4	11.89%	352,562	71,510	118,340	162,713
Children 5-14	20.66%	612,466	124,226	205,578	282,662
Young Singles (approx. 15 to 29)	20.87%	618,690	125,488	207,667	285,534
Mature Singles (approx. 30 to 54)	9.14%	271,026	54,972	90,972	125,083
Young Couples (approx. 15 to 29)	4.47%	132,406	26,856	44,443	61,107
Mature Couples (approx. 30 to 54)	4.60%	136,471	27,680	45,808	62,984
Mature Singles & Couples (approx 55 to 74)	9.04%	267,891	54,336	89,919	123,636
Young Families with Children (0 to 4)	6.26%	185,485	37,622	62,259	85,604
Mature Families with Children (5 to 14)	13.06%	386,998	78,494	129,898	178,605
Totals	**100.00%**	**2,963,996**	**601,184**	**994,884**	**1,367,928**

The total of the foreign, domestic and resident market size is, therefore, summarised as follows;

Assumed Total Available Market Size of Potential Visitor Numbers to the Project (used to calculate Market Share %'s)	NUMBERS		TRAVEL TIME TO PROJECT		
			< 1 hour	1 hour - 2 hours	> 2 hours
	5,559,345		1,644,957	1,994,432	1,919,956

From the above base-data of foreign, domestic and resident visitor number and profiling projections the following 3 models (D, E and F) present the indicative potential market share, together with visitor numbers projections that the Project could reasonably expect to attract. It must obviously be cautioned that these models do not represent factual projections, but should rather be considered as a realistic basis upon which different scenarios of market share percentages can be applied.

MODEL D represents an assessment of potential foreign market share that may be attracted to the Project.

D. MANDENI TOURISM STRATEGY REVIEW   22/10/14 12:35
VISITOR NUMBER & MARKET SHARE PROJECTIONS

FOREIGN TOURIST VISITOR MARKET SHARE	MARKET SHARE %		TRAVEL TIME TO PROJECT			Total Foreign Visitor Number Projections
			< 1 hour	1 hour - 2 hours	> 2 hours	
Foreign Tourism Growth per year presumed at	10.87%					
Travel Time % Factoring Per Segment						
Children 0-4			6.98%	3.64%	0.77%	
Children 5-14			7.28%	3.19%	0.76%	
Young Singles (approx. 15 to 29)			12.50%	8.75%	1.54%	
Mature Singles (approx. 30 to 54)			11.20%	5.36%	1.67%	
Young Couples (approx. 15 to 29)			12.94%	5.16%	1.35%	
Mature Couples (approx. 30 to 54)			8.27%	4.74%	1.46%	
Mature Singles & Couples (approx 55 to 74)			2.36%	2.12%	0.98%	
Young Families with Children (0 to 4)			6.98%	3.64%	0.77%	
Mature Families with Children (5 to 14)			7.28%	3.19%	0.76%	
Projected Foreign Market Share						
Children 0-4	3.2456%		130	78	24	**232**
Children 5-14	3.1842%		159	80	28	**267**
Young Singles (approx. 15 to 29)	6.5526%		1,135	916	237	**2,287**
Mature Singles (approx. 30 to 54)	5.2548%		1,148	634	290	**2,071**
Young Couples (approx. 15 to 29)	5.5064%		1,529	704	270	**2,503**
Mature Couples (approx. 30 to 54)	4.2146%		1,138	752	340	**2,230**
Mature Singles & Couples (approx 55 to 74)	1.6808%		368	382	259	**1,009**
Young Families with Children (0 to 4)	3.2456%		355	213	66	**634**
Mature Families with Children (5 to 14)	3.1842%		805	407	142	**1,354**
Total Foreign Visitor Number Projections	**4.2699%**		**6,765**	**4,166**	**1,656**	**12,587**
Time Travel % Split			53.75%	33.10%	13.15%	100.00%

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MODEL E represents an assessment of potential domestic market share that may be attracted to the Project.

E. MANDENI TOURISM STRATEGY REVIEW   22/10/14 12:36
VISITOR NUMBER & MARKET SHARE PROJECTIONS

DOMESTIC TOURIST VISITOR MARKET SHARE	MARKET SHARE %		TRAVEL TIME TO PROJECT			Total Domestic Visitor Number Projections
			< 1 hour	1 hour - 2 hours	> 2 hours	
Domestic Tourism Growth per year presumed at	-1.28%					
Travel Time % Factoring Per Segment						
Children 0-4			4.78%	2.52%	1.27%	
Children 5-14			4.16%	2.26%	1.02%	
Young Singles (approx. 15 to 29)			8.76%	5.58%	1.44%	
Mature Singles (approx. 30 to 54)			6.43%	3.18%	0.98%	
Young Couples (approx. 15 to 29)			8.26%	5.11%	1.49%	
Mature Couples (approx. 30 to 54)			3.18%	2.21%	0.54%	
Mature Singles & Couples (approx 55 to 74)			1.59%	1.17%	0.36%	
Young Families with Children (0 to 4)			4.78%	2.52%	1.27%	
Mature Families with Children (5 to 14)			4.16%	2.26%	1.02%	
Projected Domestic Market Share						
Children 0-4 (with adults)	3.2452%		5,476	2,717	628	**8,821**
Children 5-14 (with adults)	2.8353%		8,279	4,233	876	**13,388**
Young Singles (approx. 15 to 29)	6.1675%		17,610	10,558	1,249	**29,417**
Mature Singles (approx. 30 to 54)	4.1498%		5,663	2,636	372	**8,671**
Young Couples (approx. 15 to 29)	5.7794%		3,554	2,069	277	**5,899**
Mature Couples (approx. 30 to 54)	2.3152%		1,410	922	103	**2,436**
Mature Singles & Couples (approx 55 to 74)	1.1997%		1,384	959	135	**2,478**
Young Families with Children (0 to 4)	3.2452%		2,881	1,429	330	**4,641**
Mature Families with Children (5 to 14)	2.8353%		5,231	2,675	553	**8,459**
Total Domestic Visitor Number Projections	**5.4643%**		**51,487**	**28,198**	**4,523**	**84,209**
Time Travel % Split			61.14%	33.49%	5.37%	100.00%

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MODEL F represents an assessment of potential resident population market share that may be attracted to the Project.

F. MANDENI TOURISM STRATEGY REVIEW   22/10/14 12:37
VISITOR NUMBER & MARKET SHARE PROJECTIONS

RESIDENT POPULATION VISITOR MARKET SHARE	MARKET SHARE %		TRAVEL TIME TO PROJECT			Total Resident Visitor Number Projections
			< 1 hour	1 hour - 2 hours	> 2 hours	
Population Growth per year presumed at	1.15%					
Travel Time % Factoring Per Segment						
Children 0-4			3.56%	2.17%	0.78%	
Children 5-14			2.84%	1.76%	0.64%	
Young Singles (approx. 15 to 29)			11.58%	6.36%	2.29%	
Mature Singles (approx. 30 to 54)			9.47%	5.76%	1.25%	
Young Couples (approx. 15 to 29)			10.17%	6.24%	1.16%	
Mature Couples (approx. 30 to 54)			3.84%	2.46%	0.81%	
Mature Singles & Couples (approx 55 to 74)			1.18%	0.69%	0.13%	
Young Families with Children (0 to 4)			3.56%	2.17%	0.78%	
Mature Families with Children (5 to 14)			2.84%	1.76%	0.64%	
Projected Resident Population Market Share						
Children 0-4 (with adults)	1.8104%		2,546	2,568	1,269	**6,383**
Children 5-14 (with adults)	1.4622%		3,528	3,618	1,809	**8,955**
Young Singles (approx. 15 to 29)	5.5404%		14,532	13,208	6,539	**34,278**
Mature Singles (approx. 30 to 54)	4.4311%		5,206	5,240	1,564	**12,009**
Young Couples (approx. 15 to 29)	4.6926%		2,731	2,773	709	**6,213**
Mature Couples (approx. 30 to 54)	1.9784%		1,063	1,127	510	**2,700**
Mature Singles & Couples (approx 55 to 74)	0.5309%		641	620	161	**1,422**
Young Families with Children (0 to 4)	1.8104%		1,339	1,351	668	**3,358**
Mature Families with Children (5 to 14)	1.4622%		2,229	2,286	1,143	**5,659**
Total Resident Population Visitor Number Projections	**4.0510%**		**33,815**	**32,792**	**14,371**	**80,978**
Time Travel % Split			41.76%	40.49%	17.75%	100.00%

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MODEL G below, summarises the indicative foreign, domestic and resident visitor profiling and visitor number projections from Models D, E and F above, that indicate a market share percentage of approximately 3.2% of the total

potential market size expressed above of around 5.56m, which equates to projected annual visitor numbers in the order of magnitude of approximately 177,774, with the profiling as indicated below in Model G.

G. MANDENI TOURISM STRATEGY REVIEW   22/10/14 12:38
VISITOR NUMBER & MARKET SHARE PROJECTIONS - 2011 BASE LINE SUMMARY

TOTAL VISITORS & MARKET SHARE VISITOR MARKET SHARE	MARKET SHARE %	TRAVEL TIME TO PROJECT			Total Visitor Number Projections
		< 1 hour	1 hour - 2 hours	> 2 hours	
Projected Total Adult Market Share	**2.5134%**				
made up as follows:					
Young Singles (approx. 15 to 29)					
Foreign Tourists	0.0411%	1,135	916	237	2,287
Domestic Tourists	0.5291%	17,610	10,558	1,249	29,417
Residents	0.6166%	14,532	13,208	6,539	34,278
Mature Singles (approx. 30 to 54)					
Foreign Tourists	0.0373%	1,148	634	290	2,071
Domestic Tourists	0.1560%	5,663	2,636	372	8,671
Residents	0.2160%	5,206	5,240	1,564	12,009
Young Couples (approx. 15 to 29)					
Foreign Tourists	0.0450%	1,529	704	270	2,503
Domestic Tourists	0.1061%	3,554	2,069	277	5,899
Residents	0.1118%	2,731	2,773	709	6,213
Mature Couples (approx. 30 to 54)					
Foreign Tourists	0.0401%	1,138	752	340	2,230
Domestic Tourists	0.0438%	1,410	922	103	2,436
Residents	0.0486%	1,063	1,127	510	2,700
Mature Singles & Couples (approx 55 to 74)					
Foreign Tourists	0.0182%	368	382	259	1,009
Domestic Tourists	0.0446%	1,384	959	135	2,478
Residents	0.0256%	641	620	161	1,422
Young Families with Children (0 to 4)					
Foreign Tourists	0.0114%	355	213	66	634
Domestic Tourists	0.0835%	2,881	1,429	330	4,641
Residents	0.0604%	1,339	1,351	668	3,358
Mature Families with Children (5 to 14)					
Foreign Tourists	0.0243%	805	407	142	1,354
Domestic Tourists	0.1522%	5,231	2,675	553	8,459
Residents	0.1018%	2,229	2,286	1,143	5,659
Children with Families	**0.6843%**				
made up as follows:					
Child 0 to 4					
Foreign Tourists	0.0042%	130	78	24	232
Domestic Tourists	0.1587%	5,476	2,717	628	8,821
Residents	0.1148%	2,546	2,568	1,269	6,383
Child 5 to 14					
Foreign Tourists	0.0048%	159	80	28	267
Domestic Tourists	0.2408%	8,279	4,233	876	13,388
Residents	0.1611%	3,528	3,618	1,809	8,955
Total Visitor Number Projections					
Children 0 to 4 (with Adults)	**0.2776%**	**8,151**	**5,363**	**1,921**	**15,435**
Foreign Tourists		130	78	24	232
Domestic Tourists		5,476	2,717	628	8,821
Residents		2,546	2,568	1,269	6,383
Children 5 to 14 (with Adults)	**0.4067%**	**11,965**	**7,931**	**2,713**	**22,610**
Foreign Tourists		159	80	28	267
Domestic Tourists		8,279	4,233	876	13,388
Residents		3,528	3,618	1,809	8,955
Adults 15 to 54	**2.4251%**	**69,558**	**49,901**	**15,361**	**134,819**
Foreign Tourists		6,109	3,626	1,344	11,080
Domestic Tourists		36,349	20,289	2,885	59,523
Residents		27,100	25,985	11,132	64,217
Adults 55 to 74	**0.0883%**	**2,394**	**1,961**	**555**	**4,909**
Foreign Tourists		368	382	259	1,009
Domestic Tourists		1,384	959	135	2,478
Residents		641	620	161	1,422
Total Market Share Projections	**3.1977%**	**92,068**	**65,156**	**20,550**	**177,774**
Time Travel % Split		51.79%	36.65%	11.56%	100.00%

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4.3   MARKET DEMAND ANALYSIS CONCLUSIONS

The total potential market size of approximately 5.56 million visitors related to the North Coast Area of KwaZulu-Natal, for the type of attraction envisaged for the future of tourism within MLM, is considered to be of a reasonable size and worthy of further consideration for the Project. However, it must be cautioned that the size determination is not founded in empirical data related to the Project specifically for the KwaZulu-Natal North Coast, as no such data appeared readily available.

Similarly, the estimated 3.2% potential market share, resulting in approximately 178,000 visitors per year (based upon 2012 data), could be considered as being able to positively contribute to the MLM tourism economic sector. From a macro perspective, such visitor numbers could possibly contribute upwards of R200m (including a multiplier effect) per annum into the local economy, thereby resulting in new job creation, in the order of 1,000 to 1,400 people (these indicative numbers will be subject to further verification during Phase 2 of the Project).

It must, however, be noted that, these visitor numbers could be considered as a conservative indication and, therefore, limited concept development planning for the African Village Beach Experience is recommended in the first instance. This is considered to be further impacted by the assessed current tourism visitor number trends to the North Coast area, in general. Available statistics, analysed as part of this Project, indicate that both foreign and domestic tourist visitor numbers into KZN are in decline, from both a numbers and market share perspective.

Whilst the African Village Beach Experience project could assist in reversing these current negative trends, it is suggested that MLM / IDM investigate reasons and actions that may be required related to the overall tourism sector decline for the North Coast. A more buoyant North Coast tourism economic sector should assist in enhancing the African Village Beach Experience opportunity for increased visitor numbers and its economic success.

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5.   **TOURISM PRODUCT SUPPLY INCLUDING ENVIRONMENTAL AND CULTURAL HERITAGE ISSUES**

This section addresses Tourism Product Supply Issues and a Situational Analysis of the Mandeni Local Municipality.

5.1.   **TOURISM STRATEGY REVIEW & COMPARISON**

Typically, HSSA would conduct field research in order to develop and review a tourism product supply database. However, the aim of this project is to conduct a review of an already existing Mandeni Tourism Strategy. As such, HSSA has drafted the following table that compares the tourism product supply within the context of the 2001 and 2008 Mandeni Tourism Strategies, conducted by Zama O'Brien Consulting and Graham Muller & Associates respectively, as well as the newly proposed 2014 Tourism Strategy, being put together by HSSA.

Table 3: Tourism Strategy Review & Comparison

DEVELOPMENT OF A LOCAL TOURISM STRATEGY AND BUSINESS PLAN – MANDENI REGION, 2000 (ZAMA O'BRIEN CONSULTING).	TOURISM STRATEGY, FEASIBILITY REPORT & BUSINESS PLANS FOR CATALYTIC PROJECTS FOR MANDENI LOCAL MUNICIPALITY, 2008 (GRAHAM MULLER ASSOCIATES).	TOURISM STRATEGY CURRENT REVIEW AND RESEARCH ON THE ESTABLISHMENT OF MUNICIPAL TOURISM INFORMATION CENTRE AND MUSEUM, 2014 (HALEY SHARPE SOUTHERN AFRICA).
VISION		

The development of the, "Thukela Frontier Tourism Development & Publicity Association", which will be responsible for carrying out the following proposed vision and mission statement.
 	
Proposed Vision:
To establish, within a 5-year timeframe, the Mandeni area as one of KwaZulu-Natals' principal domestic and foreign tourist attractions through the development and marketing of it's Natural, Heritage and Cultural tourism assets.
 	
Mission Statement:
Through the formation of the Thukela Frontier Tourism Development & Publicity Association create a joint Public / Private / Community initiative that will guide and deliver the necessary tourism products and developments that will achieve the Vision.
 	
✓ The actual type of natural, heritage and cultural tourism offering needs to be developed and differentiated.
	"To utilise Mandeni's local expertise and labour resources in combination with international capital and targeted marketing activities in order to fully exploit the potential of the abundant natural and historical resources of the area such that Mandeni Local Municipality is transformed into a prime tourism destination in KwaZulu-Natal and southern Africa, thereby reaping the economic benefits of tourism to the area".
	
	✓ The natural and historical resources of Mandeni, as it stands, do not constitute a strong primary attraction. Therefore, the primary tourist attraction needs to be suitably developed to render Mandeni a prime tourism destination.
		HSSA propose that Mandeni develop its natural tourism offering, in the form of the beach, as its primary tourist attraction.
		
		HSSA proposes that Mandeni develop its heritage, cultural and historical tourism offerings as secondary tourism attractions.
		
		HSSA proposes that the beach be developed into an authentic African beach experience.
		
		✓ *An authentic African beach experience:*
		  o *Afro-centric perspective.*
		  o *African versus Tuscan design.*
		  o *It does not have to necessarily include swimming in the ocean or blue flag status beaches. Instead, it could offer an authentic, local, traditional, community-based and used tourism hub along the beach.*
		  o *The hubs could include restaurants, pubs, shops, markets, open public spaces, which offers the tourist an authentic African beach experience with sea views, ocean breeze, sand between the toes type of feeling.*
		  o *Peace and Tranquillity.*
		  o *Place to unwind. To chill and relax. Rest.*
		  o *Place to switch off. Take your shoes off.*
		  o *Paradise.*
		  o *Simplicity. Sustainable.*
		  o *Eclectic. Design should be non-intrusive.*
		  o *Affordable. Accessible. Approachable. Memorable.*
		  o *Run by the locals.*

DEVELOPMENT OF A LOCAL TOURISM STRATEGY AND BUSINESS PLAN – MANDENI REGION, 2000 (ZAMA O'BRIEN CONSULTING).	TOURISM STRATEGY, FEASIBILITY REPORT & BUSINESS PLANS FOR CATALYTIC PROJECTS FOR MANDENI LOCAL MUNICIPALITY, 2008 (GRAHAM MULLER ASSOCIATES).	TOURISM STRATEGY CURRENT REVIEW AND RESEARCH ON THE ESTABLISHMENT OF MUNICIPAL TOURISM INFORMATION CENTRE AND MUSEUM, 2014 (HALEY SHARPE SOUTHERN AFRICA).
SUMMARY & OVERVIEW / OUTCOMES & RECOMMENDATIONS		

The key recommendations include:
 	
• Formulating an entity that will be responsible for driving tourism in the area.
 	
• Identifying a primary attraction and developing it (the beach).
- The development of the Thukela Mouth into a coastal resort destination and the associated Development Master Plan and Implementation Strategy (Domestic focussed).
- The development of a Thukela Frontier Interpretive Centre as a principal Visitor Attraction and the associated Conceptual Design Proposal and Development Master Plan (Foreign market focussed).
• Development of a tourism route
• Further developing secondary attractions as well as tourism facilities (food, beverage, shopping and accommodation).
 	
✓ *The core recommendations of this Local Tourism Strategy and Business Plan could still apply to Mandeni Local Municipality.*
  o *However, reconsider coastal "resort" approach to that of the proposed African beach experience.*
  o *However, the development of an information office and museum cannot occur in isolation. It will need to be accompanied by a primary attraction development.*
 	
✓ *Key considerations:*
  o *It is to be considered why the Tourism Strategy was never acted upon.*
  o *The beach, as a primary attraction, needs to be developed. However, the past decade of research has revealed that Mandeni cannot develop its beaches ito of a traditional swimming beach due to various environmental and topographical reasons. The beach should still be developed, but in a different manner than the typical KZN North Coast experience. This manner is envisioned to be an African beach experience.*
	HSSA has provided general comments below for the Product Strategy - Catalytic Projects identified in the 2008 report.
	
	• N2 Service Station: Discarded
	
	  ✓ *Potentially reconsider for inclusion in a visitor centre / info centre / tourism hub.*
	
	• Blue Flag Beach Status: Discarded
	
	  ✓ *Potentially reconsider developing the beach into an authentic African beach experience. Not necessarily Blue Flag beach status.*
	
	• Nandi Memorial: Discarded
	
	  ✓ *Agree*
	
	• Amatikulu Resort: Discarded
	
	  ✓ *Potentially reconsider Amatikulu (or Dokodweni) to be redeveloped in line with the authentic African beach experience.*
	
	• More accommodation at Amatikulu: Discarded
	
	  ✓ *Potentially reconsider Amatikulu could be redeveloped in line with the authentic African beach experience and to include more accommodation.*
	
	• Conference Facilities in Ngwenya Nature Reserve: Business Plan Prepared
	
	  ✓ *HSSA are not of the opinion that a conference facility could lead to sustained tourism. The conference market is in decline.*
	
	• Development of an Adventure Hub on the southern banks of the Thukela: Business Plan Prepared
	
	  ✓ *HSSA agrees with this in principle. This proposal can be compared to the 2000 report, which suggested that Thukela Mouth be developed into a coastal resort. However, this was proposed on the northern banks of the Thukela River. The need for some sort of tourism hub remains relevant.*
	  ✓ *The location, product offering and operators need to be reconsidered. Amatikulu / Dokodweni could be a potential location.*
		✓ *BEACH PRIMARY ATTRACTION:*
		  o *The question remains: What is the primary attraction in Mandeni?*
		  o *It needs to involve the beach, whether it is sea, estuary or lagoon oriented.*
		
		  o *Two potential locations still remain:*
		    o *Thukela River Mouth (north or south bank)*
		    o *Amatikulu / Nyoni Estuary / Dokodweni*
		
		  o *What is the USP of the beach offering? It cannot be "Blue Flag Beach Status", therefore, HSSA suggests an authentic African beach experience.*
		
		  o *An information office / tourist visitor centre / museum / adventure hub is needed. Where is this to be? This could form part of the beach development. It may serve best to have one tourist focused area for the start. That is, to combine the (beach / nature and heritage / culture) offerings in terms of promotion and operation.*
		
		✓ *CULTURE SECONDARY ATTRACTION:*
		  o *Propose to link King Shaka Route to the south and the Zulu Heritage Route 66 to the north, with Mandeni Local Municipality. The Zulu Heritage Route 66 could start at either the Thukela, or prawn shack location.*
		
		✓ *TOURISM FACILITIES:*
		  o *Accommodation, food and beverages facilities are lacking. The Municipality and (if applicable), the new entity would need to enable private business development within and around the beach development.*
		
		✓ *MANDENI TOWN TOURISM FACILITIES:*
		  o *It is HSSA's opinion that Mandeni Town has limited tourism potential, other than that related to accommodation and related tourism facilities associated with business and industry of the area. Existing tourism product facilities within the Ilembe District, in close proximity to Mandeni, further compete and will challenge the potential success of tourism product within the Town.*

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	• Revival of the Battle of Ndondakusuka: Business Plan Prepared ✓ *HSSA agrees with this in principle.* This proposal can be compared to the 2000 report, which suggested that a Thukela Frontier Interpretive Centre be developed. The culture theme and offering remains relevant. ✓ The location, product offering and operators need to be reconsidered. The bookings and promotion of the battle could take place at the Adventure hub / info office, while the battle itself could be re-enacted further inland, at the relevant site. ✓ *Key considerations:* o *This report bases the success of its suggested primary attractions on The Ruwaad Group AmaZulu World (theme park) and the King Shaka statue, which are both developments which have not occurred. Of the three business plans developed (Ngwenya Conference Centre, Thukela Adventure Hub, Battle of Ndondakusuka), HSSA is of the opinion that none of them could function solely as a primary attraction. Unless the adventure hub is combined / included in the African beach experience, and is carefully considered and developed into a product that the market would respond to positively.*	
MARKET ISSUES		
MARKET ISSUES: Tourist Segmentation		

o Domestic and Foreign tourism sectors.
 	
✓ *This still holds. Although the foreign market should not be the core focus.*
 	
o Targeted at the low to mid-end of the Tourism Market.
 	
✓ *This still holds.*
	• Target the foreign tourist market and high spend domestic tourists.
	
	✓ *The foreign market should not be the core focus. HSSA is not necessarily in agreement that high spend tourists should be targeted. High spend domestic tourists already have most of the north coast of KZN to choose from. There are limited options for low to mid-end domestic tourists. However, if Mandeni develops a unique African beach experience, it may appeal to all high, mid and low-end domestic tourists, as well as the foreign market.*
		✓ *In order of priority:*
		  o *Local tourists – residents from the area*
		  o *Domestic tourists – from KZN and the rest of South Africa*
		  o *Foreign African tourists*
		  o *Foreign international tourists*

MARKET ISSUES: Tourist Demand Analysis		
• Whilst the Domestic Tourism sector is, and will remain, an important component within KwaZulu-Natal, the major socio-economic growth potential lies within the Foreign Tourism Sector. ✓ *This is no longer the case. The focus target market should be*	• Adventure tourists ✓ *Without the foefee slide, and with the current (lack of) tourism offerings in Mandeni, it is not clear what would attract adventure tourists.*	

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local residents and domestic.
 	
• The Mandeni Local Council, by strategically developing and positioning itself with regard to the Domestic and Foreign Tourism sectors and their perceived needs, is considered as having the potential to develop an identity as both a domestic and foreign tourist destination in order to secure a share of the KwaZulu-Natal tourism market.
 	
  ✓ *It is most important to get the product working for the local market first and foremost.*
	• Historical tourists
	
	  ✓ *If the Battle of Ndondakusuka is developed in isolation of other routes (such as Route 66 and the King Shaka Route), as well as other tourism offerings, it may not be enough of a product to attract and sustain historical tourists.*
	
	• Nature tourists
	
	  • *Mandeni's beaches and nature reserves would require serious attention and redevelopment in order to develop them into a competitive primary attraction. Nature tourists should remain the primary tourist type.*	

MARKET ISSUES: Supply-Chain Analysis		
	Competition: • North Coast – upmarket coastal experience • South Coast – family destination • Durban – urban playground of the Zulu Kingdom	
PRODUCT ISSUES		
PRODUCT ISSUES: Identified Nodes / Sites / Products		

• An extremely limited amount of current attractions have been found to fall into the category of Wildlife, Natural Scenic Beauty, and Culture within Mandeni.
 	
  ✓ *This is still the case.*
 	
• However, located to the north of Mandeni lies the heart of Zululand, an area rich in Wildlife; Natural Scenic Beauty; and Zulu Culture.
 	
  ✓ *Zululand is a different district so it cannot be relied upon or necessarily leveraged to bring tourism to Mandeni. Rather it is currently competition. Unless, a route is used to bring the two areas together.*
 	
• Mandeni Town is perceived as having very limited Tourism potential, but its surrounding areas are perceived as having significant Tourism Attraction development potential.
 	
  ✓ *This still holds.*
 	
• The coastal location of Mandeni, together with the Thukela River
	Product Strategy - Catalytic Projects
	
	• N2 Service Station (Discarded)
	
	• Blue Flag Beach Status (Discarded)
	
	• Nandi Memorial (Discarded)
	
	• Amatikulu Resort (Discarded)
	
	• More accommodation at Amatikulu (Discarded)
	
	• Conference Facilities in Ngwenya Nature Reserve (Business Plan Prepared)
	
	• Development of an Adventure Hub on the southern banks of the Thukela (Business Plan Prepared)
	
	• Revival of the Battle of Ndondakusuka (Business Plan Prepared)
	
	  ✓ *See HSSA's comments on each of the projects provided for in the*
		✓ *The Primary Tourist Attraction is proposed to be: Natural Scenic Beauty – The Beach.*
		
		Beach Development Location & Concept
		  o *Both the 2000 and 2008 reports suggest a development at Thukela Mouth.*
		  o *2000: suggests north bank, coastal resort destination.*
		  o *2008: suggests south bank (as Ruwaad development proposed for north bank), adventure hub.*
		  o *2011: The beach itself cannot be developed into a swimming, blue flag status. The Thukela River and Estuary is generally seen to have poor water quality and under threat. Perhaps, a water based experience can still be developed, but at the lagoon just north of the Amatikulu / Nyoni Estuary, in the Dokodweni precinct.*
		
		✓ *The Secondary Tourist Attraction is proposed to be: Zulu Heritage & Culture*
		
		  o *2000: Suggests development of a Thukela Frontier Interpretive Centre as a principal Visitor Attraction.*
		  o *2008: Suggests an Adventure Hub on the southern banks of the Thukela*

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Mouth, provides the potential of growing its share of the Domestic Tourism Market. ✓ *The coastal product offering needs to be defined ito domestic tourist needs and wants.* • Durban is recognised as the principal tourism gateway to KwaZulu-Natal, and Mandeni has the potential to become the gateway from Durban into Zululand and visa versa. In particular attracting a large share of passing traffic for 'day-trips' as well as limited 'stay-overs'. ✓ *This still holds.* • It is proposed that the growth opportunity lies in the strategic development of the current Thukela Mouth township on the northern bank of the Thukela River, as a 'Coastal' Visitor Attraction, holiday destination and coastal residential area, utilising the access to the beach and the river as its principal attractions. ✓ *The focus is still the beach experience as a primary attraction. However, the exact location is to be defined. It could include the Thukela mouth and / or Dokodweni.* • 2 core strategic tourism development initiatives: - The development of the Thukela Mouth into a coastal resort destination. ✓ *Beach development at Thukela Mouth cannot be a cut and paste coastal resort from the rest of the South African coast. It needs to have a USP.* ✓ *Is Thukela Mouth still the correct location for primary attraction development?* - The development of a Thukela Frontier Interpretive Centre as a principal Visitor Attraction. ✓ *HSSA no longer feels that an Interpretive Centre could function as a primary attraction. It could however, function as a secondary attraction in terms of diversity (actual offering to be further developed).* ✓ *Is Thukela Mouth still the correct location for secondary attraction development?* • Mandeni Local Council is to look beyond its Local Government boundaries and to assess the inherent tourism assets and attractions that exist within a radius of say a 1 to 2 hour drive.	*Summary and Overview above.*	o *2014: The information office / visitor centre / adventure hub / museum / interpretive centre could take on one form, at the chosen "beach development" location. It need not necessarily be at the site of Ndondakusuka Hill.* *Zulu Heritage Route / Route 66* o *HSSA is not of the opinion that this route, in its current state and as a sole offering, could function as the Primary Tourist Attraction for Mandeni Local Municipality.* o *This is a tourism route following the R66 between Gingindlovu and Phongola. The project is a joint initiative between uThungulu District Municipality (28), Zululand District Municipality (26), Tourism KZN and uMlalazi Tourism Association.* o *This route could potentially start down at the banks of the Thukela River in iLembe District Municipality (29). To extend up to the palaces of Nongoma.* *King Shaka Heritage Route* o *King Shaka Heritage Route is located in Ballito and is one of Ballito's Cultural Sites, it follows in the footsteps of one of the great Zulu Chiefs. This route could be extended to include Mandeni and the "Thukela Frontier".* ✓ *On a recent trip around Mandeni, the following establishments were visited:* *Nkwezi Camp / Prawn Shack area* o *This seems to be the northern most tip of Mandeni Local Municipality, in the 'Dokodweni' Precinct.* o *There is currently a conference centre and a deck.* o *Signage is lacking.* o *There is a stunning lagoon in front of the camp, which could be developed into a tourism cluster / hub offering water activities, food and beverage.* o *There are basic public facilities here.* *Ngwenya Nature Reserve* o *It could possibly be developed as a trail-based area with provision of community facilities.* o *However, a people / staff component is required.* o *A Conference Facility, as suggested by Graham Muller, would not necessarily be a good idea as there is no accommodation in the area, and conferencing is a declining market.* o *Ngwenya is far off from the beach* o *It is managed by both Sappi and Mandeni Municipality*

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✓ *In this instance, the tourism opportunities beyond the local government boundaries may provide too much competition to Mandeni. Mandeni should look at developing its own unique primary attraction product offering.*
✓ *Mandeni should look at how it can leverage from existing routes ito secondary attractions.*
 	
• Identified Business Plan Components / Product Strategy:
  - Formation of the Thukela Frontier Tourism Development & Publicity Association
 	
✓ *It does not appear that this ever happened. Currently there is a Mandeni CTO.*
 	
  - Appointment of a Tourism Manager / PRO
  - Development of an Immediate Tourism Route
  - Existing Site Upgrades
    o The Battle of the Thukela (the existing Cairn or original site reinstated)
    o The Battle of Ndondakusuka (using the area of the Mathambo Stream preferably within the iNgwenya Reserve with access from the area close to the petrol station adjacent to the R102.)
    o The Mangete home of John Dunn
    o Ultimatum Tree
    o Fort Pearson, including the military cemetery
    o Harold Johnson Nature Reserve
    o Fort Tenedos
    o KwaWili
  - Community Product Development & Training
  - Thukela Mouth Development
  - Thukela Frontier Interpretive Centre
  - Event Management & Co-ordination
  - Tourism Manager / PRO Services and Ongoing Market Research & Feedback
		o *A management plan cannot be found for Ngwenya.*
		o *Signage is lacking.*
		o *No Management Plan can be sourced.*
		
		Harold Johnson Nature Reserve
		o *It is not clear if Harold Johnson Nature Reserve could develop a self-sustaining economy.*
		o *No Management Plan can be sourced.*
		
		Amatikulu Nature Reserve
		o *Currently there are self-catering units*
		o *Currently there is the option to fish, using provided tender*
		o *Opportunity for birding, multi-trail and regeneration*
		o *Potential land claim issues. Management plan cannot be accessed on the internet.*
		o *No Management Plan can be sourced.*
		
		Amatikulu / Nyoni Estuary
		o *This is the site of the "lagoon", identified as a potential site for "beach experience development".*
		
		Thukela Mouth / Estuary
		
		Boat Launching
		o *Contact: Omar Paruk (Dep. Of Agriculture): 033 355 9438*
		
		Accommodation
		o *One accommodation facility identified as Lalanathi Guesthouse in Mandeni town.*
		
		(Other) Heritage
		o *Dunn Story & Mangete*
		o *Nkoshini Community*

PRODUCT ISSUES: Function-Mix Options Analysis		
The development of the Thukela Mouth into a coastal resort destination • Coastal and river mouth location • Proximity to the N2 Freeway • Approximately one-hour drive north of Durban. • The role of the Mandeni Council is to develop Master Plan and Implementation Strategy, thereby facilitating the Private Sector to participate in the variety of development opportunities that are	The following gives key points to the 8 identified potential catalytic projects: N2 Station Concept: • Area just before the N2 was considered, to provide a short cut, via the N2 off-ramp, to historical sites such as Fort Pearson, Ultimatum Tree and Harold Johnson Nature Reserve	*Potential Activities* ✓ *Hikes* ✓ *Walks* ✓ *4x4 rides* ✓ *MTB / cycling* ✓ *Fishing* ✓ *Lagoon cruises*

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anticipated to arise as a result. ✓ Is the Council capable of such? <u>The development of a Thukela Frontier Interpretive Centre as a principal Visitor Attraction.</u> • The area has significant historical importance • Location proposed to be near N2 freeway, adjacent to the western Mandeni off-ramp toll plaza • Rich cultural heritage going back over 200 years • River forming the "Thukela Frontier" between Zululand and the Natal Colony during the 19th Century • Battles that occurred on the banks of the Thukela in the Mandeni area • The Battle of the Thukela (1838) • The Battle of Ndondakusuka (1856) • The Anglo/Zulu War Ultimatum (1879) • Interwoven with the Zulu History through the reigns of Shaka, Dingane, Mpande and Cetshwayo, John Dunn • The role of the Mandeni Council is recommended as facilitating the Traditional Community involvement and undertaking the initial detailed research and design development of the Thukela Frontier Interpretive Centre. Thereafter securing the involvement of the Private Sector in its development and operations. ✓ Is the Council capable of such? <u>Tourism Economic Activities identified:</u> • Tour Groups (no significant socio-economic benefits) • Thukela Mouth (limited availability of 'tourism spend facilities' – tourism needs purchased elsewhere) • Harold Johnson Reserve (relatively insignificant economic benefit) • Riverview Guest House (insignificant economic benefit) ✓ This does not appear to still exist • Ingwenya Reserve (insignificant economic benefit) • Mandeni Golf Course & Bowling Greens (insignificant economic benefit) • Thukela Raft Race (insignificant economic benefit) • Fishing Competitions (limited availability of 'tourism spend facilities' – tourism needs purchased elsewhere) • Amatikulu Reserve (insignificant economic benefit) • Local Mandeni Annual Spring Fair – September (insignificant economic benefit)	• Could enable a cluster development of income generating tourism services Non-Feasibility: • Site is too close to the Shell Ultra City in KwaDukuza • There is already an Engen One Stop planned for Richard's Bay Going Forward: • There is a lack of service stations in Mandeni • Consideration of the development of an N2 off-ramp at Fort Pearson and to other historical sites ✓ This could potentially link with the info centre / museum / visitor (secondary & tertiary) attraction. <u>Blue Flag Beach</u> Concept: • Also proposed in LED Strategy, Municipal IDP and Siyaya Coastal Plan Non-Feasibility: • Absence of facilities • Poor water quality • Large number of sharks (shark nets do not work as in Mtunzini) • Flooding of the Thukela River • Same would apply at Amatikulu / Dokodweni beach location ✓ HSSA has also identified Amatikulu / Dokodweni beach as a potential location for "beach" development. What this development is needs to be conceptualised. That is, beyond a blue flag beach. • Positioning for angling fishing is better than beach tourism ✓ HSSA does not necessarily agree with this. Mandeni still needs a primary attraction. Angling fishing alone is not enough. A beach offering needs to be developed as a primary attraction. Going Forward: • Promote angling fishing tourism • Consider a tidal pool • Look for beaches south of the Thukela River ✓ How does looking south of the Thukela River help Mandeni tourism? <u>Queen Nandi Memorial</u> Concept: • The Mhlongo clan of Chief S'khonyana Mhlongo, now living in Ndulinde, is the clan of Queen Nandi, the mother of Shaka Zulu. As such, the community has proposed that a memorial to Queen Nandi be built in Ndulinde in recognition of their famous ancestor. The site identified for the	✓ Beach / Lagoon side picnics ✓ Horse riding ✓ River rafting ✓ Kite surfing ✓ Eat and drink out at bars and restaurants ✓ Local food ✓ Local culture ✓ Shabeen ✓ Shisinyama ✓ Local music and dance ✓ Arts and craft ✓ Fresh produce ✓ Viewing of prawn farming (However, it is believed that this no longer exists) ✓ Stokvels <u>Accommodation</u> ✓ Simple accommodation ✓ Home-stays ✓ Backpackers ✓ Self-catering ✓ Caravanning ✓ Camping <u>Public Amenities</u> ✓ Braai facilities ✓ Picnic facilities ✓ Bottle store ✓ Local drug store / "tea room" / "off-licence" ✓ Town square / piazza <u>Style</u> ✓ Peri-urban ✓ Rural-urban ✓ Shanty town feel ✓ Coastal village ✓ Can walk everywhere

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- Bird and butterfly watching (insignificant economic benefit) - Seula sports and recreation centre at Thukela Mouth (no further info) ✓ *This is understood to be a part of TVG. The Ventures Group is a teambuilding company that specialises in offering a wide spectrum of services and products to the Corporate Teambuilding sector and the Youth Educational Sector.* Tourism products and services identified: - Primary Attraction - Mangete – Dunn Family – Zulu linkage and hiking trails - Zulu military kraal ✓ *HSSA acknowledges that these attractions alone cannot and do not suffice as a primary attraction. Hiking trails and cultural sites serve as diversity ito secondary attractions. They are not enough to stimulate significant tourism on their own.* - Secondary Attraction - Cruises on the Thukela – sunset type of vessel - Angling safaris from Howard Johnson Reserve - Commercialise Howard Johnson Reserve for visitors - Coastal hiking - Eco-Adventure activities (horse, hiking, bike) - Educational / industrial - Rail line potential - River linkage (Pollution an issue) - Backpackers - Other: - Prawn / Fish Industry (private sector) - Events development (to be further considered) - Cultural / Community Involvement - Associated Products and Services identified: - Arts & Craft - Fresh produce - Employment - Meycol land – Olive Rocks – Thukela Mouth Development - Hospitality unit development - Animal farm - Identification of applicable Tourism "Intellectual Property" and associated Government Initiatives. - Need to fill gaps in KZN North Coast.	proposed memorial is deep in the undulating terrain of Ndulinde, set atop a hill with a panoramic view of the surrounding area. The site is said to be a Zulu impi meeting ground which used to act as a vantage point from which to survey the area. Non-Feasibility: - The argument for building a memorial to Queen Nandi in Ndulinde based on her ancestral lineage is a shaky one. Queen Nandi never stayed in Ndulinde, as her clan originally lived elsewhere. Furthermore Queen Nandi spent most of her life in the royal residences of Senzakahona and her son Shaka. - Location of Ndulinde is far off and has poor infrastructure as well as an ugly cellular telephone tower - The memorial as a stand-alone heritage offering is not enough to draw the tourist Going Forward - While a Queen Nandi Memorial situated in Ndulinde is never likely to attract significant tourist numbers, the memorial could nonetheless still be built to honour the Mhlongo tribe. ✓ *The focus of the project remains local economic development. Anything that does not result in such should be carefully considered.* Amatikulu Resort Concept: - Addressing gap in the market - Upper-market, eco-friendly luxury bungalows - North bank of the Amatikulu estuary, as well as Dokodweni - Connect with Amatikulu Nature Reserve for bird watching and hiking - Recreational fishing Non-Feasibility: - To label this project as non feasible is probably a misuse of the term. Three main issues: - o The Reserve is currently under land claims and the opposite bank is presently tribal land ✓ *What is the current status of land claims?* - o Environmental regulations could hamper development ✓ *Environmental concerns will always need to be considered and should not necessarily prevent development discussions.* - o Uncertain nature of Ruwaad investment ✓ *It appears that the Ruwaad development never occurred. Why did it never take place?*	

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✓ *Perhaps the gap to fill is found all over KZN and even South Africa (ito the proposed African beach / community experience)* - Launch of Regional Tourism Forum – Thukela to Mozambique. TKZN – LSDI – URC/IRC - Uthungulu Regional Council Regional Standing Committee. - Stanger (Ilembe) Tourism (KZNEC) – Ilembe Chamber of Commerce – Dolphin Coast Publicity Association. ✓ *The current institutional structure needs to be clearly understood. At present it seems there is no existing structure that can drive tourism development in Mandeni.* - Crime Issues – Tourism Awareness. - Tourism Route Linkages.	Going Forward: • Further investigation should be undertaken to explore the possibility of a resort on the banks of the Amatikulu estuary. ✓ *HSSA agrees with this suggestion. If the land claim issues can be resolved, then the concept should be reconsidered. However, HSSA feels that the "resort" concept is no longer applicable. The market needs and desires do not necessarily support this kind of a concept.* Increased accommodation at Amatikulu Nature Reserve Concept: • Expand the tented camp (currently 12 sleeper) Non-Feasibility: • Unresolved issue of land claims • Ezemvelo felt accommodation during week showed too much slack to warrant more accommodation ✓ *This is not necessarily the right approach.* Going Forward: • Further investigation should be taken should land claim issues be resolved ✓ *What is the current status of land claims?* Conference Facility in Ngwenya Nature Reserve Background: • Reserve is municipal-owned • Underutilised and in state of disrepair ✓ *HSSA could barely find the entrance. Signage is sorely lacking.* Project Description: • High class conference centre to stimulate business tourism • Business tourism could result in cash flow to municipality and local economic development • Natural surroundings differentiator • Existing guesthouse to provide accommodation • Site located 300m from entrance • 150 delegate cinema style • Meetings, special events and functions • Accommodation development would encourage a greater market • Potential competition in Durban, Mtunzini and Prince's Grant Market:	

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	• Sappi Tugela Mill, Isithebe Business Estate, Mandeni Municipality • Further afield from Richards Bay, Empangeni and Eshowe • Gap = no conference facilities in Mandeni Local Municipality, besides unregistered Nkwazi Camps (100 seater) at Dokodweni and Seula Zimbili (80 seater) Financial Model – Feasibility Analysis: • Marketing & Promotion: • Brand Identity • Promotion • Advertising ✓ HSSA is of the opinion that the conference market is in decline and therefore would not necessarily agree with this recommendation. <u>Adventure Hub along the banks of the Thukela River</u> Project Description: • Development of an adventure hub on the southern banks of the Thukela, which is proposed as a primary attraction • Development of the world's longest foefee slide / Zip Line across the Thukela River ✓ HSSA does not feel that a foefee slide would succeed as a primary attraction. The Graham Muller report links the foefee slide proposal to the massive potential of the Dubai theme park development, proposed for the north bank of the Thukela River, however, this development never occurred, therefore it cannot count on the theme park for market share. • Extending on the range of activities offered by Suela Zimbili Edu-Venture Camp - Working with "angler's paradise". • Activities could include rock climbing, abseiling, quad biking, kayaking, rafting, mountain biking, archery, boat trips to Thukela mouth, bird watching, visiting historical sites, foefee slide etc. ✓ HSSA would reconsider the proposed development of a foefee slide as a primary attraction, as it does not seem sustainable. • Accommodation (60 bed backpackers, 20 bed b&b) • Cultural attraction (themed accommodation, rehabilitation of original cane-cutting dwellings, tea garden, craft shop, historical recreations) • Adventure base (bookings office for adventure activities in the area, information centre, pick up and drop off points) • Linking with natural environment, historic sites and adventure camp; tourism cluster	

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	• Site identified is on a hill just outside of Harold Johnson Reserve, land owned by TVG ✓ *It appears that the development of this Adventure Hub is very TVG focussed. Any adventure hub / tourism hub / info centre etc would need to involve the community. HSSA agrees with the principle that a tourism hub of sorts is needed. However, the operators, product offering and location need to be carefully considered.* Market: • Foreign and domestic • Adventure seeking tourist • Potential competitors are Oribi Gorge and Karkloof Canopy Tours Financial Model – Feasibility Analysis: • Marketing & Promotion: • Brand Identity • Promotion • Advertising Revival of the Battle of Ndondakusuka Project Description: • The battle of Ndondakusuka, fought between the sons of Zulu King Mpande in 1856, is the bloodiest battle in South African history. • The battle of Ndondakusuka is little known in popular South African history. As a tourist attraction it is, save for the visits of a few small independent tour parties, a virtual non entity. Yet in terms of scale, this battle had far more fatalities than any other battle in South African history. • The aim is to revive the battle of Ndondakusuka and exploit the potential of this unique and highly significant event in KwaZulu-Natal history. • Construct a memorial on Ndondakusuka Hill • The battle could be commemorated in a one day event. • Development of a museum or war shrine on Ndondakusuka Hill • Re enactment, recreation of the battle of Ndondakusuka by Dundee Diehards • Zulu dancing and cultural performances • Stalls and the sale of cultural artefacts • Linkages to possible conference facility in Ngwenya Nature Reserve and King Shaka Statue • The exact location of the battle of Ndondakusuka has long been disputed. In fact the idea that an exact location for the battle can be found is misguided. Market: • Historical and cultural tourists • Gap – developing a unique historical attraction in South Africa	

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	• USP – bloodiest single, documented, battle in Southern African history; as overwhelmingly Zulu affair; just over 20km from the coast; close to Durban. Financial Model – Feasibility Analysis: • Marketing & Promotion: • Create a Brand Identity • Promotion • Advertising ✓ *HSSA agrees that a cultural offering needs to be provided. Linkages to King Shaka Trail and Route 66 should be considered.*	
PRODUCT ISSUES: Concept Development Plan		

DOMESTIC TOURISM:
 Thukela Mouth Development Master Plan and Implementation Strategy is needed and should include:
 • A development plan for a 'Coastal' Visitor Attraction, holiday destination and coastal residential area
 • Ease of access to the beach and river facilities as its principal attractions.
 • Requires a comprehensive consultative process with Local Communities, Local and Provincial Government Authorities and other Key Stakeholders.
 • Target market will predominantly be low to mid-range Domestic Tourists and residents similar to the existing St. Lucia and KZN South Coast destinations.
 • Commercial and Visitor Attraction Centre with easy access to the Beach, River and Shoreline Facilities for use by Residents, Visitors, Holidaymakers, Anglers, Boats and other Watercraft.
 • Residential and Tourism Accommodation Facilities needed.
 • Camping and Caravanning Grounds
 	
 FOREIGN TOURISM
 Principal Visitor Attraction - Conceptual Design Proposal and Development Master Plan for a "Thukela Frontier" Interpretive Centre:
 • A comprehensive consultative process with Local Communities, Local and Provincial Government Authorities and other Key Stakeholders
 • Public/Private/Community development of a world-class Zulu Interpretive Centre in the form of an ikhanda (a royal capital / homestead / military barracks), with interpretive storylines being presented along various identified core themes.
 • Traditional Arts and Crafts
 • Manufacturing and Retailing facility
	Fundamental Strategies:
	 • Increase the number of tourists to the region
	 • Target the foreign tourist market and high spend domestic tourists
	 • Develop a unique and relevant tourism product that is internationally competitive
	 • Effectively market/provide branding for the Mandeni tourism 'product'.
	
	 ✓ *HSSA agrees with these fundamental strategies. However, the domestic target market could change.*
	
	 General Tourism Strategies & Associated Key Actions:
	 • Promote angling fishing tourism along Mandeni's coastline
	   a) Keep rivers, particularly the Thukela, unpolluted
	   b) Engage with Tongaat-Hulett Group with respect to developing the south bank of the Thukela River
	   c) Open up the beaches between Thukela Mouth and Amatikulu
	   d) Contact ESA and look to increase the number of fishing events taking place in the country
	   e) Ensure the safety of fisherman as a top priority
	   f) Include the local community
	   g) Provide safe boat launches
	   h) Develop Thukela Mouth Village as a world class fishing destination
	   i) Provide an access road to the Thukela River Mouth
	     i. Provide access to the beaches north of the Thukela Mouth Village
	     ii. Create boardwalks for easier access to beaches for the elderly or disabled
	     iii. Provide space for a tourism office at the beach parking area
	     iv. Ensure safe parking at the beach access
	     v. Construction of a tidal pool
	     vi. Creation of beach and river trails
		Proposed African coast / beach experience.
		
		 Places of influence include:
		 ✓ *Ponta Do Ouro, Mozambique*
		 ✓ *Ponta Malongane, Mozambique*
		 ✓ *Sodwana Bay, South Africa*
		 ✓ *Tamarindo, Guanacaste, Costa Rica*
		 ✓ *Puerto Viejo, Caribbean Coast of Costa Rica*
		 ✓ *Pucon, Chile*
		 ✓ *Zanzibar, Tanzania*
		
		 As per the MM IDP:
		 This project is to respond to the number of opportunity spaces that have been identified for further investigation as to their development potential. Moving from north to south, these are:
		
		 ✓ *Prawn Farm – this area is in a highly sensitive environmentally important area, but is disturbed, and forms an important economic generator in the local community. It must be investigated for more appropriate marine or agricultural related use, as it is presently used illegally for the manufacture of animal products.*
		
		 ○ *HSSA has been unable to find the exact location of this Prawn Farm. Client is to advise if possible.*
		
		 ✓ *Prawn Shack – this is the area currently used by the Nkwazi Camp and is an important rustic tourism facility along the coast. It can be retained as a rustic facility, linked to the proposed Dokodweni Beach, and to the more up market facility proposed for south of the Amatikulu River. It provides an important tourism facility catering for a specific experience. Any further development will however be restricted as it is located in a particularly sensitive eco area at the edge of the estuary.*

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- Commercial Food and Beverage outlets - Other commercial tourism operations - Possibly a Petrol Station - Local tour guides and operators - A reservations centre ✓ *It may not be necessary to have separate strategies for domestic and foreign tourists.* Strategic Tourism Development programme: - The facilitation of involvement of the local Traditional Communities in the process, including capacity building in product development, tourism related training and SMME opportunities - The formation of a Tourism Development & Publicity Association - The employment of a Tourism Manager / PRO for the Association - The development of an immediate Tourist Route for the Thukela Frontier and upgrade of existing sites - The preparation of a Thukela Mouth Development Master Plan - The research and design development of a Thukela Frontier Interpretive Centre - Formalisation of Event Management & Co-ordination within the Mandeni area - Securing of necessary funding for the implementation of the Tourism Strategic Development and Business Planning recommendations - To plan for a Mandeni Investors Conference in early to mid-2002 when it is anticipated all the preliminary development planning work will be completed	vii. Location of a restaurant at Thukela Mouth viii. Exploiting the tourism potential of the lighthouse • Keep the Thukela River clean and unpolluted a) Put in place an effluent management policy b) Consistently monitor pollution levels in the river and adopt a set of water quality standards c) Prevent dumping in or along the river d) Remove invasive, alien plant species from the river and river banks e) Engage with uThukela Catchment Management Agency • Ensure the efficient management of nature reserves in Mandeni a) More effective monitoring of staff at the Reserves by Ezemvelo KZN Wildlife b) Ensuring the quality of facilities at the Reserves and the safety of the animals c) Outsource management of the nature reserves to suitably qualified candidates in the private sector d) Extend Harold Johnson Nature Reserve e) Mutually beneficial interaction between Harold Johnson and Seula Zimbili f) Address the issue of land claims at Amatikulu g) Follow through on the Ngwenya Nature Reserve Management Plan • Provide safe environments for tourists a) Develop self-contained tourism focused international standard resorts b) Ensure a more secure environment at the Ultimatum Tree and other historical sites c) Give the local community a stake in tourism activity • Provide linkages for historical sites a) Package a historical tour specific to Mandeni b) Make historical sites in Mandeni an essential stop on historical tours c) Improve access to historical sites d) Link historical sites to adventure activities • Upgrade historical sites a) Improve information at Fort Pearson b) Develop Ultimatum Tree site c) Develop Fort Tenedos site d) Develop a memorial for the battle of Ndondakusuka e) Explore the possibility of a cultural re-creation of John Dunn's life	o *The Client is to advise what the more up market facility proposed for south of the Amatikulu River is, as HSSA has been unable to determine this.* ✓ *Long term opportunity space – this has been identified on a spur from which there are good views of the coastline. It could be considered for a resort / hotel type complex in due course.* o *The Client is to advise on the location of the long term opportunity space identified above.* ✓ *Amatikulu Nature Reserve – this is one of the most important facilities along the coast and is proposed to be expanded. This creates an opportunity for a significant, five star standard, flagship type development, catering for international tourists, as it is in a magnificent location, is easily linked to the N2 and is in very close proximity to the new airport.* o *No management plan can be found for the Amatikulu Nature Reserve.* ✓ *Thukela Mouth – there is little opportunity for a significant beachfront resort type development at Thukela Mouth. It is therefore proposed that an area just north of the village be released for the development of a resort, with functional linkages to the village, the new town centre and the other development proposed along the Thukela River.* o *The Client is to advise on any development proposals that may exist for the Thukela River area.* o *No management plan can be found for the Thukela Mouth Area.* ✓ *Thukela River – there are three proposals in the pipeline for development on privately owned land along the north bank of the Thukela River. These applications are to be welcomed as they may well serve as catalysts for further development in the area, however they must be aligned with the planning for the Siyaya Coast, and cannot be formally supported until there is certainty that the Siyaya Coast Development Plan can be implemented as proposed by the Municipality.* o *The Client is to advise on any development proposals that may exist for the Thukela Mouth area.* o *No management plan can be found for the Thukela River.* ✓ *Historical sites – The historical sites at Mangete, Ndondakusuka Hill,*

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	at Mangete • Increase number of events taking place in Mandeni 　a) Look into the possibility of receiving the athletic road race from Stanger to Mandeni 　b) Establish a cycling race 　c) Promote water kayaking or canoeing events on the Thukela River 　d) Work in conjunction with organisations such as ESA in promoting more fishing events along the Mandeni coastline 　e) Assess the viability of hosting a music festival in Mandeni Local Municipality • Increase tourist spending on accommodation 　a) Increase the supply of accommodation in the municipality 　b) Spread accommodation options more widely 　c) Provide more varied accommodation 　d) Provide accommodation supporting infrastructure • Effective Signage 　a) Sign off N2 for Harold Johnson, Fort Pearson, Ultimatum Tree 　b) Sign off N2 for accommodation at Thukela Mouth 　c) Sign off N2 for Prawn Shack and Dokodweni Beach ✓ HSSA agrees with all of these.	*Fort Tenedos, Fort Pearson and the Ultimatum Tree all present unparalleled opportunities for tourism related development, with the central feature being Ndondakusuka Hill which is the site of the Military Kraal which represents the Zulu social system which was the cause or excuse for the Anglo-Zulu War. It is therefore also an important opportunity space for a central catalytic development which attracts tourism into the area, and from where is can radiate out to the other nearby sites.* 　○ *There is no mention here of Harold Johnson Nature Reserve and Nwenya Nature Reserve.*
PRODUCT ISSUES: Community Inclusion / Benefits		
• Limited interaction has occurred with the Local Traditional Communities within the Mandeni area, in terms of gaining their input into the process. 　✓ Local Traditional Community engagement still remains a key requirement for any successful development.		*For anything to be successful, it needs to include the local traditional communities.*
PRODUCT ISSUES: Gap Analysis		
		There does not seem to be: ✓ *Thukela Estuary Management Plan* ✓ *Amatikulu / Nyioni Estuary Management Plan* ✓ *Ingwenya Nature Reserve Management Plan* *Outstanding:* ✓ *Amatikulu Nature Reserve Management Plan* ✓ *Harold Johnson Nature Reserve Management Plan* ✓ *Studies undertaken by Ruwaad Group development* *In the Mandeni CMP, mention is made of Precinct 4 in Dokodweni, and the*

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		de-proclaimed nature reserve. There is no further information on this. Client is to advise on why Dokodweni became de-proclaimed land of the Amatikulu Nature Reserve. *The client to provide feedback on outcome of studies done by the Ruwaad development Group.*
PRODUCT ISSUES: Legislative Analysis		
PRODUCT ISSUES: Environmental Impact Analysis		
PRODUCT ISSUES: Marketing Issues		
Tourism Route development, planning, mapping, signage, brochures, website.	Marketing Strategy: 1. Creating a brand for Mandeni Local Municipality • Supra-brand: KZN – "Zulu Kingdom" • Second level brand: Zululand – "Heart and Pulse of the Zulu Kingdom" • Sub-brand: Thukela Coast – "The Pulse of the Zulu Kingdom", offering: - Zulu Frontier Adventure Hub - Mighty slide - Angling along Mandeni coast - 3x Nature Reserves - Battle of the Princes battle re-enactment - Development of a theme park (Dubai Ruwaad Group) • Tagline: "Be Surprised!" • Other sub-brands: - Durban: "Playground of the Zulu Kingdom" - Battlefields: "Legends of the Zulu Kingdom" - Drakensburg: "Soul of the Zulu Kingdom" • Brand Pyramid: - Brand Identity: Be Surprised! - Brand Values: Exciting, exhilarating, natural, quality, surprising - Brand Personality: Casual, energising, genuine, friendly, captivating - Emotional Benefits: Once in a lifetime experience, stories to tell, rejuvenation - Rational Benefits: Close to Durban, easy escape from the city, unique experience, un-crowded, range of attractions - Attributes: Rich culture and history, adventure activities, un-spoilt coastline, the mighty Thukela River and the Amatikulu Estuary, King Shaka Statue and Theme Park • Concerns: industrial area, pollution and crime 2. Tourism Marketing Infrastructure	

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	• Set up a specialised tourism destination website for Madeni Local Municipality, e.g. www.Thukelacoast.co.za • Support for the Community Tourism Organisation at the Thukela Mouth. The CTO should be included in all planning forums 3. Establishment of a tourism office in the Municipality. Considering the presence of the CTO at Thukela Mouth it may be the best idea to establish a tourism office at the village itself. E.g. KwaDukuza Municipality currently operates a tourism office from Ballito. 4. Encouragement of the location of Tour Operators in Mandeni Advertising & Promotion 1. Identify the target market 2. Maximise general media coverage 3. Target high tourist locations 4. Establish links with Travel and Tourism websites and publications 5. Increase physical advertising 6. Promote events 7. Link tourism products in Mandeni with Tour Operators	
ACCESSIBILITY ISSUES		
Does not appear to have been specifically considered	Does not appear to have been specifically considered	Will need to be considered further once specific product are identified as part of the strategic review
ACCESSIBILITY ISSUES: Destination Marketing		
ACCESSIBILITY ISSUES: Means of Access – National / Local / Specific		
ACCESSIBILITY ISSUES: Brochures, websites, signage		
		✓ *Mixed spellings of "Ngwenya ".* ✓ *There is hardly any signage to Ngwenya Nature Reserve. It was not clear where the entrance was.* ✓ *Very little signage for Amatikulu Nature Reserve. Signage only found once in the reserve.*
ACCESSIBILITY ISSUES: Infrastructure Needs		
STABILITY ISSUES: Political Stability & Perception of Personal Safety		
✓		• Crime Issues. ✓ *Crime and perception of safety is still an issue.*

5.2. TOURISM PRODUCT SUPPLY REVIEW

The following table lists the tourism products within Mandeni Local Municipality. HSSA has assigned each product a priority rating in terms of the hierarchy of tourism offerings. High indicates that the product relates to a Primary Tourist Attraction. Medium indicates that the product relates to a Secondary Tourist Attraction and therefore offers diversity. Low indicates the product relates to general tourism facilities, in the form of shopping, accommodation and food & beverages.

Table 4: Tourism Product Supply Review

TOURISM PRODUCT	IMPORTANCE RATING	
Angling & Deep Sea Fishing	Medium	Offers diversity
Amatikulu Nature Reserve	Medium	Offers diversity
Amatikulu Tours	Medium	Offers diversity
Dokodweni Beach	High	Offers a primary attraction
Fishing Competitions	Medium	Offers diversity
Fort Pearson	Medium	Offers diversity
Fort Tenedos	Medium	Offers diversity
Harold Johnson Nature Reserve	Medium & Low	Offers diversity & facilities
John Dunn Settlement	Medium	Offers diversity
King Shaka Heritage Route	Medium	Offers diversity
Lobotes Deep Sea Charters, Thukela Mouth	Medium & Low	Offers diversity & facilities
Local Mandeni Annual Spring Fair	Medium	Offers diversity
Lalanathi Guesthouse	Low	Offers facilities
Mandeni Golf Course & Bowling Greens	Medium	Offers diversity
Ndulunde Hills & Ndondakusuka Hills & Battle Site	Medium	Offers diversity
Ngwenya Nature Reserve	Medium	Offers diversity
Sugar Farms	Medium	Offers diversity
The Hatchery	Low	Offers facilities
The Prawn Shack & Nkwazi Camps	Medium & Low	Offers diversity & facilities
The Ventures Group (TVG) & Seula Zimbili	Medium	Offers diversity
Thukela Mouth Resort	Medium & Low	Offers diversity & facilities
Thukela North Beach	High	Offers a limited primary attraction
Thukela South Beach	High	Offers diversity (primary attraction is limited due to accessibility)
Thukela Raft Race	Medium	Offers diversity
Ultimatum Tree	Medium	Offers diversity
Zulu Heritage Route 66	Medium	Offers diversity

5.3. STRATEGY REVIEW KEY SUMMARY POINTS

HSSA feels that the principle suggestions of the 2000 report still have merit:

- Formulating an entity that will be responsible for driving tourism in the area.
    - *At present there is no entity that is responsible for driving tourism in the area.*
- Identifying a primary attraction and developing it (the beach).
    - *However, conceptually it cannot be a typical coastal resort development. Rather, it needs to be an African coastal resort development.*
    - *In terms of location it can be developed at the Thukela Mouth and / or Dokodweni, just north of Amatikulu,*
    - *An Interpretive Centre, whether it includes an information office or museum, does not necessarily function as a primary Visitor Attraction. Therefore, the principal effort needs to be the beach development.*
- Development Master Plan for a "Thukela Frontier" Interpretive Centre
    - *This concept still holds value. It could include the Battle of Ndondakusuka as well as all of the other heritage products associated with Mandeni. The location of the Centre should be located where it best serves the tourists.*
- Development of a tourism route
    - *Mandeni can look to be included into both the King Shaka Route and the Zulu Heritage Route 66.*
- Further developing secondary attractions as well as tourism facilities (food, beverage, shopping and accommodation).
    - *These facilities are to be developed and run by the locals.*

HSSA is in agreement with the following suggestions from the 2008 report:

- Amatikulu Resort (Discarded)
    - *A coastal resort development of some sort is needed. However, this could possibly take place at Dokodweni.*
- More accommodation at Amatikulu (Discarded)
    - *Additional accommodation is needed. However, this could possibly take place at Dokodweni.*
- Development of an Adventure Hub on the southern banks of the Thukela (Business Plan Prepared)

- *An adventure hub, which would function as an information centre and possibly museum, is required. However, this development could take place at Dokodweni.*
- Revival of the Battle of Ndondakusuka (Business Plan Prepared)
  - *HSSA is of the opinion that the Battle of Ndondakusuka can be included as a heritage offering along with all of the other heritage products associated with Mandeni. Therefore, the location of the revival of the battle need not be on Ndondakusuka Hill. Instead, it can be located where it serves the tourists best.*
  - *Additionally, it could be included in either the King Shaka Route or the Zulu Heritage Route 66.*

Summary of Findings Considered Relevant to the Way Forward

- A Tourism Entity must be established that will be responsible for driving and implementing the Tourism Strategy.

- The beach, as a Primary Tourist Attraction, is to be developed into an African village / beach experience.

- Mandeni is to link its heritage stories with the King Shaka Route to the south and / or the Zulu Heritage Route 66 to the north, as well as the proposed King Shaka Statue. The N2 Dokodweni Junction (277 / R66) is recommended as the preferred location. As this will also become the main intersection for access to the 'African Village Beach Experience'.

- Further tourism facilities of accommodation, food and beverage and shopping are recommended for future growth of tourism within MLM.

5.4.   TOURISM STRATEGIC DIRECTION FOR THE WAY FORWARD

The following diagram offers a visual summary of the above strategy comparison and key points from Section 5.1. and Section 5.2. Circles 1 and 2 identify potential locations for the proposed African Beach Experience. While Circle 3 identifies a potential location for a tourism hub with regards to the King Shaka Route and the Zulu Heritage Route 66. This will be further developed in the Phase 2 Report.
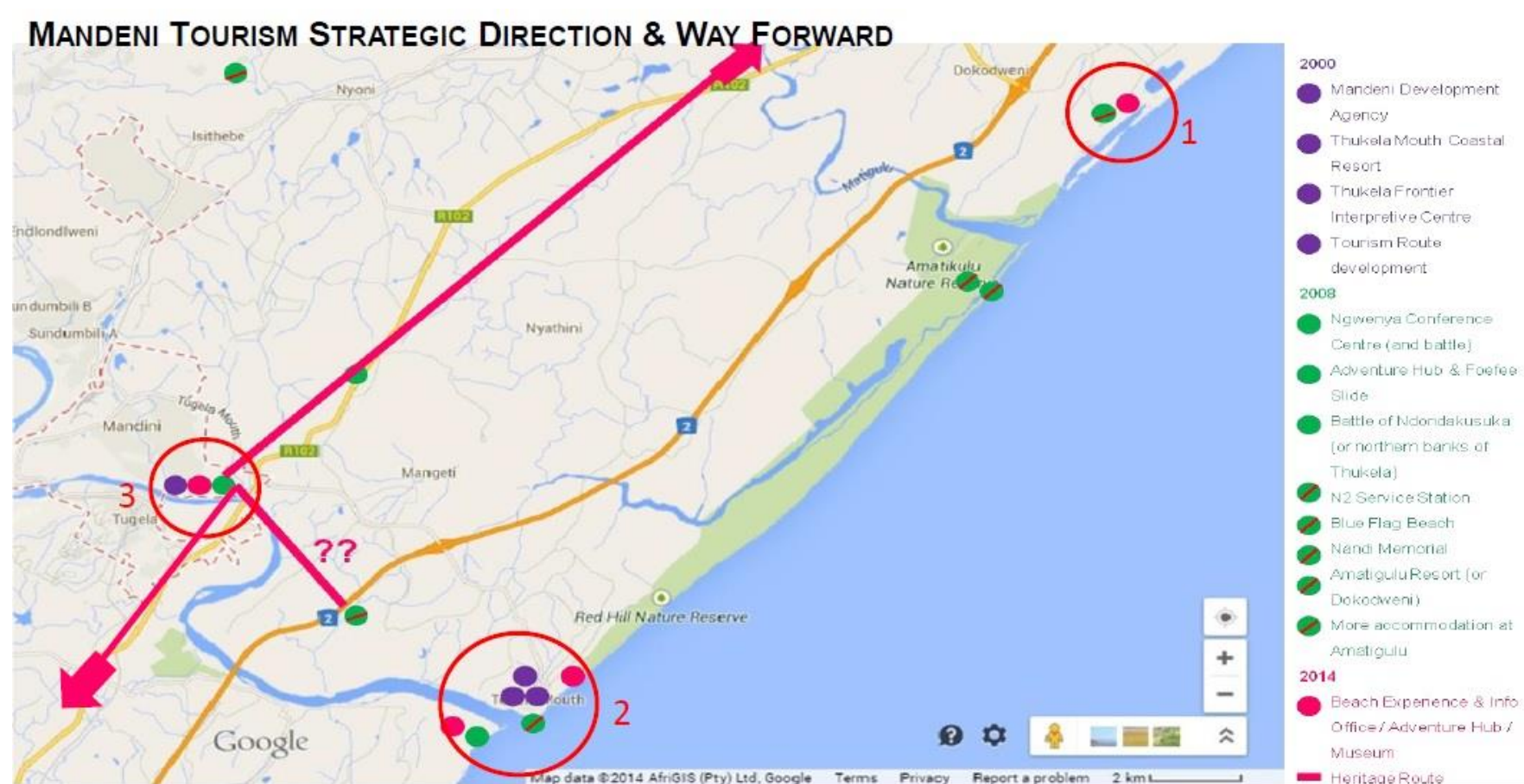
In order to formulate a strategic direction for the tourism economic sector for Mandeni, it is considered critical to assess the location in conjunction with product that has the potential to maximise the growth in tourism visitor numbers and revenue and thereby job creation within the tourism sector. By assessment of the three locations, indicated in the above diagram, the following analysis is provided.

Location 3: Mandeni Town, Ngwenya Nature Reserve & N2 Junction

This is considered the least appealing location as a potential primary tourism destination, which, except for limited commerce and industry accommodation and facilities, offers little in terms of tourism development opportunity. With the plethora of tourism accommodation and facilities elsewhere in iLembe, such development in Mandeni would be considered of having limited potential to attract the growth in tourism visitor numbers considered necessary for tourism economic sustainability.

Location 2: Thukela River Mouth linked back to N2 Junction

This location has the appeal of being a potential beach destination and could be considered with linkages northwards up to Amatikulu Nature Reserve. However, the current development footprint, together with its location at the mouth of the Thukela River, is considered as being limiting for further tourism development that would provide meaningful opportunity for visitor number growth. However, it is considered viable for the strategy to address upgrading of the Thukela Mouth tourism product generally, in order to boost the tourism economy.

Location 1: Dokodweni linked back to N2 & R66

Dokodweni is considered as the preferred destination for tourism development for a number of reasons.

- Accessibility from the Dokodweni junction of the N2 with the R66 can be considered as favourable for ease of access for tourists.

- It complies with the concept of being a southern anchor point to the Route 66, provided that the proposed product development blends with the ethos of the Route.

- Dokodweni as a junction has the potential to provide linkage between Route 66 to the north and the King Shaka Route from the south, thereby possibly being the location for any development of a tourism information office and museum (an area adjacent to the N2 could be considered as a future tourism intermodal hub).

- Access from the Dokodweni junction to the lagoon / beach is approximately 3km.

- It is considered that the lagoon setting (sense of place) offers a unique tourism development location along the north coast.

- Dokodweni offers a very real opportunity for the planning and development of a rural community beach experience in line with the national and provincial tourism strategies.

- The concept of an African beach village not only offers KZN with a new form of tourism product, but could also offer competition to similar style destinations along the Mozambique coast, which in recent years appears to have grown market tourism market share from KZN.

- Through proper planning and implementation processes, maximisation of community involvement will ensure minimisation of economic leakage from the Mandeni area.

- This strategic development opportunity is considered to have the potential to become a primary tourism destination along the north coast, thereby attracting growth in visitor numbers for the benefit of iLembe as a whole, as well as acting as a tourism economic catalyst for further tourism development and facilities elsewhere within the Mandeni area.

The proposed area for the African Beach Development is the area between Amatikulu Nature Reserve and Siyaya Coastal Park. This land is understood to have been proclaimed part of the Amatikulu Nature Reserve, but has since been de-proclaimed, as is understood from the Mandeni Coastal Management Programme. This area is now understood to be TC area and therefore ITB land. Any future development of this land will need to include engagement with the local traditional authorities.

5.4   LOCAL ECONOMIC DEVELOPMENT (LED) BEST PRACTICE PRINCIPLES

This section looks at best practice principles and insight from various perspectives that Mandeni's Tourism Strategy will draw on. The review is based on Local Economic Development (LED) principles, which will be applied to the strategy in Phase 2.

It is understood that the primary objectives of the first phase of the project is to conduct an Initial Feasibility Study and Situational Analysis for Mandeni's Tourism Strategy. It is understood that within the context of the tourism industry, this translates into the need to create a focus on the maximisation and management of 'tourism revenue yield'[1] (TRY) in a responsible and sustainable manner. This means that the development of the proposed concept requires a focus on maximisation of TRY through appropriate product development and management that is driven from a market demand perspective. Therefore, to maximise TRY is about managing the right mix of high, mid and low-spend tourists being attracted to the proposed development, together with the right mix of tourism products, clustered within an accessible environment that the tourists will spend money on.

It should be understood that tourism is a 'market driven' as opposed to a 'product driven' industry. In other words, it is the market – the tourists – that decide where and how they wish to spend their leisure time and money.

The following **Best Practice "Rules"** related to tourism Local Economic Development (LED) have been developed by HSSA as a result of their extensive involvement with tourism planning and development work throughout southern Africa. They are provided here as a contextual framework to assist with determining the best approach to ensure that the proposed concept is aligned with Best Practice principles.

Tourism LED – Best Practice: Rule 1:   Tourists are the Primary Source of Tourism Revenue, there is therefore a need to both maintain and increase the number of tourists from existing 'high-spend' tourist-source markets, at the same time as developing new tourist-source markets through existing product maintenance, new product development and effective marketing strategies for the tourism destination and/or product.

Proposed Tourism Strategy Alignment – Mandeni's Tourism Strategy should be developed in an order that it maintains and improves visitor numbers to the already existing products and attractions within Mandeni Local and iLembe District Municipalities. It has been identified that tourism is greatly lacking in MLM. This is understood to be a result of MLM having no existing Primary Tourist Attraction. Furthermore, its beaches cannot compete with surrounding beaches within the greater Dolphin Coast.

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[1] *Tourism Revenue (TR) = sum (revenue generated by all tourism activities), where the revenue of all tourist market segments is accounted for. Tourism Revenue Yield (TRY) = TR / number of visitors.*

Tourism LED – Best Practice: Rule 2:   The higher the Tourism Revenue Yield, the greater the impact on LED.

"A tourist is defined as a person who is travelling outside their normal environment for at least one night and less than one year and is not being remunerated in the place to which they travel." (World Tourism Organisation)

Proposed Tourism Strategy Alignment – The outcome of this rule will be dependent on sustained marketing actions as per Rule 1. The total result of the revenue generated from high, medium and low spend tourists utilising MLM will contribute to the LED of the area.

Tourism LED – Best Practice: Rule 3:   Tourism, as an Export Economy, is essential to support and sustain LED.

Proposed Tourism Strategy Alignment – The concept of multiplier spend within tourism suggests that tourism provides a strong component of revenue inflow with subsequent retention of revenue within a local economy and retention of spend through tourists staying, within the area where the proposed facility is to be located, for longer periods is an important consideration in the development of the proposed facility.

MLM should be positioned such that it is accessible to the residential, domestic and foreign tourism markets. In tourism, each of these markets are considered as an export economies because they are bringing money into the facility which they otherwise wouldn't if the facility is not there.

Tourism LED – Best Practice: Rule 4:   Tourism LED will need to function within the tourism attraction hierarchal framework of facilitating 'Tourist Facilities' to support the 'Secondary' and 'Primary Tourist Attractions' of the 'Destination', whether or not the Primary and Secondary Attractions of the Destination are within the area of jurisdiction of the 'Local Authority'.

Within the context of maximising tourism revenue into an area, the tourism industry operates within a hierarchal framework of visitor attractions and facilities. A significant number of tourists need to be initially attracted into the area by a 'Primary Attraction', otherwise known as a 'Highlight' of a destination. The Primary Attraction may or may not involve payment by the tourist and will, in itself, therefore not necessarily generate a significant amount of tourism revenue, but it does attract the requisite number of tourists in order to sustain a tourism sector economy.

This will then need to be supported by a sufficient number and diversity of 'Secondary Attractions', which will assist in keeping the tourists within the area for as long as possible. Again, the Secondary Attractions may or may not involve payment by the tourist and again may not necessarily generate a significant amount of tourism revenue.

This in turn will require a sufficient supply of 'Tourist Facilities', which the tourists may use during their visit into the destination area. It is usually at the level of Tourist Facilities, that most tourism revenue can be generated for an area, e.g. accommodation establishments, restaurants, shops, etc. The following chart is provided to illustrate the tourism attraction hierarchal framework:

Diagram 6: Tourism Attraction Hierarchical Framework
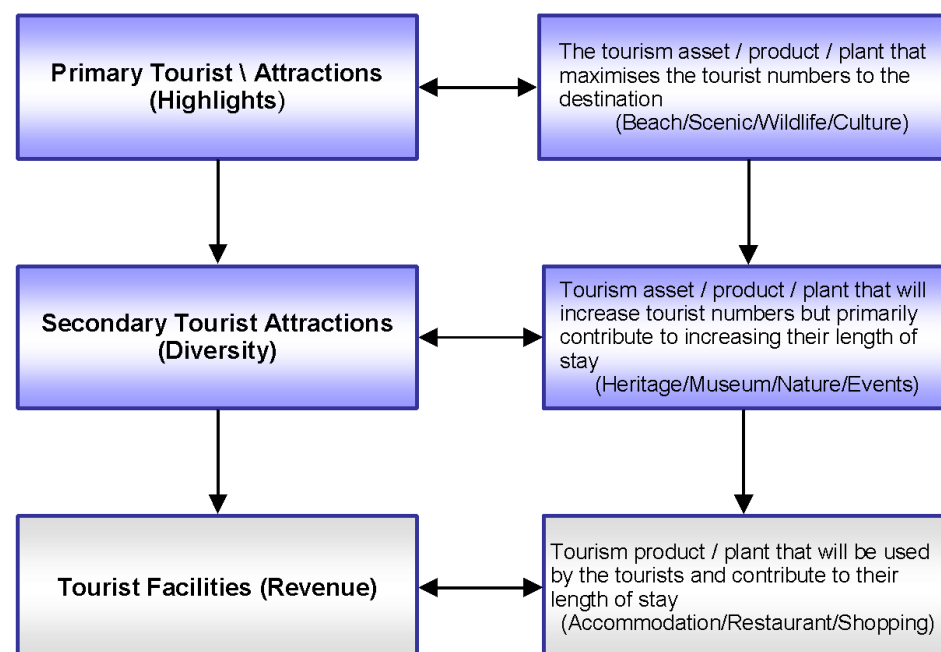
Proposed Tourism Strategy Alignment - It is proposed that the primary objectives of the MLM Tourism Strategy should be to maximise tourist numbers to the Mandeni District, increase their length of stay and spend in the area so as to grow the economic value of tourism within the area, with the resultant increase in job creation amongst the community.

Tourism LED – Best Practice: Rule 5: The viability and sustainability of an area's LED within the framework of the Tourism Sector will require the provision of Tourism Facilities capable of maximising Tourism Revenue from Tourism Product most likely to encourage maximum spend from the Tourists.

*Proposed Tourism Strategy Alignment – Market research has shown that the majority of tourism spend is on **food and beverage, shopping / entertainment** **and accommodation**.*

Therefore the development of the MLM Tourism Strategy should contemplate the provision of such facilities, and be aligned to the identified target market segment needs, to ensure that adequate tourism spend is extracted from visitors coming to the area.

Tourism LED – Best Practice: Rule 6: A Tourism Destination and/or Product(s) must identify its Targeted Tourist-source Markets; understand and meet their needs, and provide and maintain an appropriate price and quality of product and level of service.

Proposed Tourism Strategy Alignment – It is a known fact that the Word of Mouth is considered to be the best Marketing Tool. When visitors are coming to MLM, they expect excellent experience which will assist in them positively 'marketing' the experience and encourage repeat visitations.

Tourism LED – Best Practice: Rule 7: LED of Tourism Product needs to 'FIT' within the internal existing and potential Destination Mix of the area, as well as the external Tourism Enabling Environment. The Destination Mix must work holistically to increase the number of tourists into the Destination for the collective benefit of all.

Proposed Tourism Strategy Alignment – The proposed MLM Strategy should fit within what is currently being offered in the MLM as well as the iLembe District Municipality in terms of tourism attractions. This new development cannot function on its own and requires to be linked to the already existing tourism offerings.

Tourism LED – Best Practice: Rule 8: Tourism LED growth will be achieved through the establishment of the area being holistically managed and marketed as a clearly identifiable (branded) destination.

Proposed Tourism Strategy Alignment – The institutional responsibilities for management and marketing of the MLM Tourism Strategy should be conducted holistically. This should be considered from a national (SAT), provincial (TKZN), municipal (iLembe) and local regional (Mandeni) level. Incorporating or taking advantage of the already well-known brand or marketing concepts of these various levels such as, SAT's "Inspiring New Ways", TKZN's "the Zulu Kingdom", is advisable. The aim is to maximise the leverage on already existing marketing efforts.

Tourism LED – Best Practice: Rule 9: Tourism LED will need to function as an integral component of Local Government and within the pre-determined structures of its Policies and Frameworks (including the Integrated Development Plans), but at the same time be sufficiently freed up of unnecessary bureaucratic processes, so that it will encourage tourism growth and investment within, what is essentially, a private sector and profit motivated industry.

Proposed Tourism Strategy Alignment – This rule implies that an appropriate institutional structure should be put in place to ensure that the development of the MLM Tourism Strategy is provided for within government planning structures and policies, while at the same time, recognising the need to free up the concept from political and bureaucratic processes to ensure that public and private sector investment can be attracted to the them as well as maximum community benefits.

5.5. STRATEGIC ENVIRONMENTAL REVIEW

5.5.1. PROJECT PROCESS

Assessment of environmental conformity & planning issues

The environmental assessment required for the Situational Analysis includes analysis of the following:

- Compliance with South African Environmental legislation, standards and best practice or the project.
- A review based upon the proposed Project for the environmental issues that need to be addressed in subsequent Environmental Impact Assessment (EIA) and associated specialist studies.
- Conduct desktop and environmental review to determine information gaps for the proposed Project.
- Compliance with international trends regarding sustainable development, climate change issues, etc.
- Conduct a desktop study of the municipality's environmental policy, Environmental Management Plan and frameworks, health and safety policy and waste management plan to determine the environmental compliance issues of the municipality.
- Environmental issues as part of the SWOT Analysis

Documents That Were Reviewed During This Phase

National Policies and Environmental Legislation were reviewed for the purposes of this report:

- National Environmental Management Act: Protected Areas Act, 2003 (Act No. 57 of 2003)
- Statistics South Africa, 2007, Demarcation Board: Municipal Profiles / KwaZulu-Natal
- National Environmental Management Act (NEMA), 1998 (Act No. 107 of 1998)
- Department of Environmental Affairs and Tourism: Republic of South Africa: Responsible Tourism Manual for South Africa (2002)
- KwaZulu-Natal: Land use Management Legislation, Scope and Format (June 2003)
- KwaZulu-Natal Tourism Act (1996), (as amended, including No. 2 of 2002)

5.5.2 POLICIES

South African Tourism and White Paper 1996

The policy stipulates the requirements to assess and monitor the environmental, social and economic impacts of tourism development and openly disclose information to ensure the active involvement of communities that benefit from tourism, including their participation in planning and decision making and the establishment of meaningful economic linkages to maintain and encourage natural, economic, social and cultural diversity and to avoid waste and over consumption of natural resources and promote sustainable use of local resources.

Department of Environmental Affairs and Tourism (DEAT) Responsible Tourism Guidelines (1996)

DEAT guidelines include the three pillars of Tourism Sustainable Development, which are as follows:

Economic

- To maximise local economic benefits of a tourism sector.
- To ensure that communities are both involved in and benefit from tourism.

- To assess the economic impacts as a pre-requisite to developing tourism.
- To marketing of tourism and tourism product development and
- The creation of equitable businesses.

Social

- To assess social impacts as a pre-requisite to development tourism.
- To ensure that tourism developments will be sensitive to host culture.
- To maintain and encourage social and cultural diversity and
- To involve communities in both planning and decision making in tourism.

Environment

- To assess environmental impacts as a pre-requisite to development tourism to the use of local resources in a sustainable manner.
- To avoid waste production and overconsumption of natural resources and
- To maintain and encourage natural diversity.

National Environmental Management (NEMA) Act No.107 of 1998

The National Environmental Management Act, 1998, regulates the environmental impact of development. Application of environmental authorisation has to be made to undertake activities that are listed in the Act as activities that may have a substantial detrimental effect on the environment.

However, it should be noted that it could be possible for a development to have a substantial detrimental effect on the environment even though it is not listed as an activity that may have a substantial detrimental effect on the environment in the Act. Thus, it is imperative that the Municipality should be empowered enough to refer such developments to the environmental authority for environmental impact assessment.

Sustainable development is deep rooted within the principles of the NEMA and sustainable development is defined as follows: "the integration of social, economic and environmental factors into planning, implementation and decision making so as to ensure that development serves present and future generations"

The Principles of the Act state that:

(S2)(2) Environmental management must place people and their needs at the forefront of its concern and serve their physical, psychological, developmental, cultural and social interests equitably.

(3) Development must be socially, environmentally and economically sustainable.

(4)(a) Sustainable development requires the consideration of all relevant factors including the following:

(i) That the disturbance of the ecosystems and loss of biological diversity are avoided or, where they cannot be altogether avoided, are minimised and remedied.

(ii) That the pollution and degradation of the environmental are avoided, or, where they cannot be altogether avoided, are minimised and remedied.

(iii)   That the disturbance of the landscapes and sites that constitute the nation's cultural heritage is avoided, or where it cannot be altogether avoided is minimised and remedied.

(iv)   That the waste is avoided, where it cannot be altogether avoided, minimised and re-used or recycled where possible and otherwise disposed of in a responsible manner

(v)   That the use and exploitation of non-renewable natural resources is responsible and equitable and take into accounts the consequences of the depletion of the resource.

(vi)   That the development use and exploitation of renewable resources and the ecosystems of which they are part do not exceed the level beyond which their integrity is jeopardised

(vii)   That a risk-adverse and cautions approach is applied which takes into account the limits of current knowledge about the consequences of decisions and actions, and

(viii)   That negative impacts on the environment and on people's environmental rights be anticipated and prevented, are minimised and remedied.

(b)   Environmental management must be integrated, acknowledging that all elements of the environment are linked and interrelated, and it must take into account the effect of decisions on all aspects of the environment and all people in the environment by pursuing the selection of the   best practicable environmental option.

(c)   Environmental justice must be pursed so that adverse environmental impacts shall not be disturbed in such a manner as to unfairly decimate against any person, particularly vulnerable and disadvantaged persons.

(d)   Equitable access to environmental resources, benefits and services to meet basic human needs and ensure human well being must be pursued special measures may be taken to ensure access thereto by to categories of persons disadvantaged by unfair discrimination.

(e)   Responsibility for the environmental health and safety consequences of a policy, programme, project, product, process, services or activity throughout its life cycle.

(f)   The participation of all interested and affected parties in environmental governance must be promoted, and all people must have the opportunity to develop the understanding, skills and capacity necessary for achieving equitable and effective participation by vulnerable and   effective participation , and participation by vulnerable and disadvantage persons must be ensured.

(g)   Decisions must take account the interests, needs and values of all interested and affected parties, and this include recognising all forms of   knowledge , including traditional and ordinary knowledge.

(h)   Community well being and empowerment must be promoted through environmental education, the raising of environmental awareness, the sharing of knowledge and experience and other appropriate means.

(i)   The social, economic and environmental impacts of activities, including disadvantages and benefits, must be considered, assessed and evaluated, and decision must be appropriate in the light of such consideration and assessment.

(j)   The right of workers to refuse work that is harmful to human health or the environment and to be informed of dangers must be respected and protected.

(k)   Decisions must be taken in an open and transparent manner, and the access to information must be provided in accordance with the law.

(l)   There must be intergovernmental co-ordination and harmonisation of policies, legislation and actions relating to the environment.

(m)   Actual or potential conflict of interest between organs of state should be resolved through conflict resolution procedures.

(n)   Global and international responsibilities relating to the environment must be discharged in the national interest.

(o)   The environment is held in public trust for the people, the beneficial use of environmental resources must serve the public interests and the environment must be protected as the people's common heritage.

(p)   The costs of remedying pollution, environment degradation and consequent adverse health effects and of preventing, controlling or minimising further pollution, environmental damage or adverse health effects must be paid by those responsible for harming the environment.

(q)   The vital role of women and youth in environmental management and development must be recognised and their full participation therein must be promoted.

(r)   Sensitive, vulnerable, highly dynamic or stressed ecosystem , such as coastal shores, estuaries, wetlands and similar systems require specific attention in management and planning procedures, especially where they are subject to significant human resource usage and development pressure.

Sustainable development requires the consideration of all the relevant factors, including the following:

- To avoid and minimise:
  - o   The disturbance of ecosystems and loss of biological diversity
  - o   The disturbance of landscape and sites that constitute the cultural heritage
  - o   Pollution and degradation of environment
  - o   Waste (re-use or recycle)
- The responsible and equitable use of renewable and non-renewable resources
- That a risk prevention approach is taken,
- The prevention of negative impacts on the environment and on people's environmental rights, and
- The environmental justice must be pursued so that adverse environmental effects are not distributed in such a manner as to unfairly discriminate against any person.
- The principles must be applied to all plans, projects and the sustainability of each assessed.

NEMA: Biodiversity Act 10 of 2004

The purpose of the Act is defined as "to provide for the management and conservation of South Africa's biodiversity within the framework of the National Environmental Management Act, 1998, the protection of the species and ecosystems that warrant national protection, the sustainable use of indigenous biological resources, the fair and equitable sharing of benefits arising from the bio prospecting involving indigenous biological resources, the establishment and functions of a South African National Biodiversity institute, and matters connected therewith.

Regulations to be considered include those for Protection Species (GNR 152, 2007), Endangered and Protected Species (GNR 151, 2007) and the National Biodiversity Framework GN 813, 2009

NEMA: Protected Areas Act No. 57 of 2003

The Act provides conservation and protection of ecologically viable areas representative of South Africa's biological diversity and its natural landscape and seascapes. A national register of all protected areas is established under the Act and norms and standards for the management of those areas are presented.

The objectives of the Act are as follows:

- To provide, within the framework of national legislation, including the National Environmental Management Act, for declaration and management of protected areas;
- To provide for co-operative governance in the declaration and management of protected areas;
- To effect a national system of protected areas in South Africa as part of a strategy to manage and to conserve its biodiversity;
- To provide for representative network of protected areas on state land, private land and communal land;
- To promote sustainable utilisation of protected areas for the benefit of people, in a manner that would preserve the ecological character of such areas; and
- To promote participation of local communities in the management of protected areas, where appropriate.

Protected areas may fall into the following categories:

- Special nature reserves, national parks, nature reserves and protected environment.
- Marine protected areas.
- Mountain catchment areas declared in terms of the Mountain Catchment Areas Act.
- World Heritage sites, and
- Special protected forest areas, forest nature reserves and forest wilderness area declare in terms of the National Forests Act.

The process to be followed in declaration of such areas (such as the public participation required) is defined in the Act as well as the management provision required.

NEMA: Environmental Impact Assessment (EIA) Regulations

In terms of GNR 385 of the 21 April 2005, the development of a tourism facility would probably trigger the requirements for Basic Assessment (GNR 386); however, it is possible that the development could require scoping and EIA, depending on its location, size of the area etc. It should be noted that the new EIA regulations have been promulgated on the 2nd of August 2010, the provisions of the old and the new are similar but the environmental triggers vary from Province to Province for basic assessment of some types of project, it will therefore be necessary to examine the environmental triggers before committing to the scope of any assessment for the potential tourism facility.

National Water Act No 36 of 1998

The Act identifies sustainability and equity as central guiding principles in the protection, use, development, conservation, management and control of water resources. These guiding principles recognised the human basic needs of present and future generations, the need to protect water resources, the need to share some water resources with other countries, the need to promote social and economic development through the use of water and the need to establish suitable institutions in order to achieve these fundamental principles.

The purpose of the National Water Act

The purpose of this Act is to ensure that the nation's water resources are protected, used, developed, conserved, managed and controlled in ways which take into account amongst other factors:

a) Meeting the human basic needs of present and future generation;

b) Promote equitable access to water;

c) Redressing the results of past racial and gender discrimination;

d) Promoting the efficient, sustainable and beneficial use of water in the public interest;

e) Facilitating, social and economic development;

f) Providing for growing demand for water use;

g) Reducing and preventing pollution and degradation of water resources;

h) Managing floods and droughts

The provision of the Act should be considered during construction phase of the proposed project; hence, the location of the proposed project is located adjacent to the stream. Pollution prevention measures should be in place to protect the water body during construction and post construction phase of the project.

Other Relevant Acts

National Heritage Resources Act 25 of 1999

"This legislation aims to promote good management of the natural estate, and to enable and encourage communities to nurture and conserve their legacy so that it may be carried over to future generations. Our heritage is unique and precious and it cannot be renewed, it helps us to define our cultural identity and therefore lies at the heart of our spiritual well-being and has the power to build the nation. It has the potential to affirm our diverse cultures, and in so doing and shape our national character. Our heritage celebrates our achievements and contributes to redressing past inequalities, It educates; it deepens our understanding of society and encourages us to emphasize with the experience of others. It facilitates healing and material and symbolic restitution and it promote new and previously neglected research into our rich oral traditions and customs" (Preamble to the Act). Heritage resources are defined in terms of the Act to include the following:

(a) Place, buildings, structures and equipments of cultural significance,

(b) Place to which oral traditions are attached or which are associated with living heritage,

(c) Historical settlements and townscapes,

(d)   Landscapes and natural features of cultural significance,

(e)   Archaeological and paleontological sites,

(f)   Geological sites of scientific or cultural importance

(g)   Graves and burial grounds,

(h)   Site of significance relating to the history of slavery in South Africa

(i)   Movable objects including

(j)   Objects recovered from the soil or waters of South Africa including archaeological and paleontological objects and material, meteorites and rare geological specimens,

(k)   Objects to which oral traditions are attached which are associated with living heritage

(l)   Ethnographic art and objects,

(m)   Military objects

(n)   Objects of decorative or technological interest, and

(o)   Books , records, documents, photographic positives and negatives, graphics, film or video material or sound recordings, excluding those that are public records as defined in section 1(xiv) of the National Archives of south Africa Act, 1996 (Act No.43 of 1996).

Provisions of the all environmental legislation must be considered during the development planning and implementation phases of the Project.

5.5.3 ENVIRONMENTAL ISSUES TO BE CONSIDERED WHEN DEVELOPING A NEW TOURISM ENTERPRISE

Since the current phase of the project is the situational analysis for the potential USCT multi-activity trails, it is important to note that in subsequent phases, when more specific details are known around individual projects, further research will need to identify particular environmental issues to be considered when planning for the developing new proposed tourism facilities.

According to DEAT(2002), tourism businesses have the potential to affect the local environment and its biodiversity values in a number of ways, impacts could be positive or negative. "Responsible" operators will recognise this inter-relationship and attempt to manage their impacts in such a way that they leave a positive impact on the environment. To determine how particular enterprise impacts on the environment, it is necessary to examine all aspects of the operation over a life cycle of the enterprise

Diagram 3: Life cycle of environmental management issues
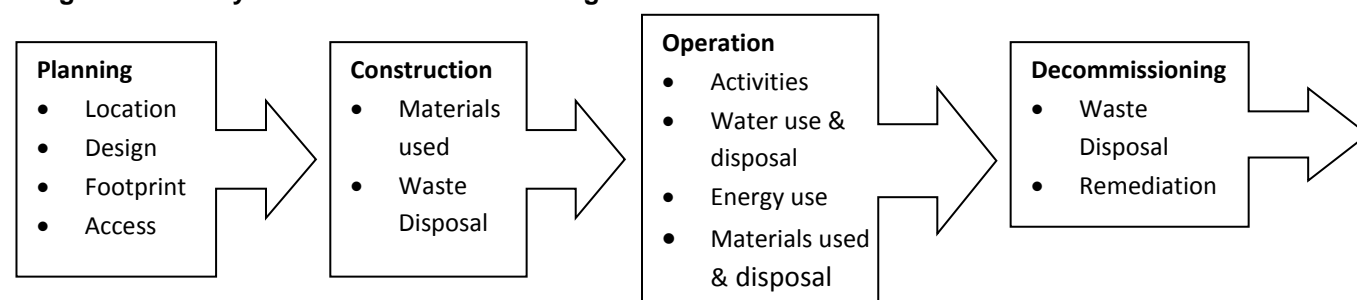
Source: DEAT (2002)

The above diagram illustrates some of the important factors to be considered when developing a new tourism enterprise, which include:

•   Planning

Several legal and planning requirements must be fulfilled as a matter of course when developing a new tourism enterprise. According to DEAT (2002), "responsible" tourism is about more than the minimum and using the opportunities presented by these processes as effectively as possible. Information that is gathered during the planning phase is very valuable to the enterprise during subsequent phases of its operations i.e.

o   Construction

Based on the environmental information contained in the EIA, the developer can request that the architects responsibly design effective buildings in relation to the local environment. "Responsible" design and planning will facilitate environmentally responsible construction.

o   Operation

According to DEAT(2002), during operating phase, it is also important to appoint a local environmental consultant to evaluate the enterprise on regular basis and to draw up an on-going environmental management plan. Such experts will be able to advice on the sensitivity of certain habitats and species in the area. It is also indicated, it is worthwhile developing a working relationship with the provincial conservation authority, which can provide advice on operating the business in a way that contributes to the improvement of conservation in area.

o   Decommissioning

If a responsible planning and design process was followed then during decommissioning it will be possible to remove all structures and rehabilitate the area to reflect the conservation value of the site prior to construction.

New tourism enterprises are encouraged to undertake designs, plans and build their operations in an environmentally sensitive manner (DEAT, 2002).

5.6   CONCLUSION

In the light of the above, it is not only important, but imperative, that MLM Tourism Strategy has to ensure that its development strategies and key project priorities take cognisance of the existing environmental problems and threats as well as natural resource assets that require protection or controlled management. Tourism development has to be underpinned by sustainable environment practices. When dealing with environmental management issues, decisions should be based on the precautionary principle. Project life cycle impact of the proposed development guidelines applicable to the stages of design, planning, construction, operation and decommissioning should be implemented at all time on future tourism development projects.

6.   ACCESSIBILITY & INFRASTRUCTURAL REVIEW

Within the context of tourism management, accessibility can be considered as those access / infrastructural features associated with a destination area that assist visitors and tourists in having appropriate and user friendly access to and within the destination area and its associated attractions, sites of interest, services, facilities and information. Accessibility can generally be split into the two components of 'soft' and 'hard' infrastructure. Soft, being the availability and accessibility of marketing and general information for potential visitors to the area, which should be seen in both qualitative and quantitative terms and this is dealt with in the Marketing Review in Section 8 of this report. Hard infrastructure relates to the physical infrastructure necessary for visitors to have ease of access into and around the area.

Accessibility components are therefore considered critical for markets to experience a tourism product or attraction over an extended stay period and through per capita spend, contribute to the local economy - preferably over a broader geographic area within the destination area. Appropriate access suggests that higher volumes of visitation are more likely if the product base has sellable features and that the destination itself has market appeal with well managed tourism support services.

Conditions being met, this will enhance the destination and product value to consumers and in so doing, increase the likelihood of higher visitor numbers, which in themselves add to the viability of the product, feature or attraction base within the destination area.

6.3.   EXISTING LEVELS AND STANDARDS OF INFRASTRUCTURE AND ACCESSIBILITY

Electricity:

The LED Strategy states that access to electricity, especially in the rural areas is severely lacking. Low density settlement patterns is prevalent in rural areas, undulating terrains and lack of bulk infrastructure pose the biggest challenges in terms of access to electricity and other services. Funding is needed to build sub-stations and provide electricity. The Mandeni IDP notes that to a certain extent provision of electricity is instrumental to the provision of water and sanitation services.

Water & Sanitation:

As per the Mandeni IDP, the more rural and traditional areas of the three Tribal Authorities are worse off with the scheme that is not functioning or not having access to basic water services. In the economic core or urban areas of the Municipality people generally have far greater access to basic water services, the only problem is around the wear and tear of the infrastructure network.

The Water services authority still has major backlogs with an over 50 % of the households not having access to water. One of the primary constraints to meeting these backlogs relates to a lack of adequate funding. A further constraint is the availability of bulk water supply. It should be recorded that the District has upgraded Sundumbili water works and it envisaged that this will be able to supply the whole Municipal area. The idea is to pump or draw piped water from the Sundumbili to various reservoirs i.e. Thukela Mouth.

Further various options are being investigated at the District Level, with the preferred option being the construction of a dam on the Umvoti River. If funding and raw water become available, the District would need to increase its internal capacity in order to meet the basic needs and persistent backlogs.

Roads:

Mandeni Local Municipality is strategically located near national and provincial road network. The rural roads are in poor condition.

Landfill Site:

The landfill site is privately owned.

Railway:

There is a railway line. However, the security of the railway line has been questioned. The security of this service should be addressed, as many local and domestic tourists will rely on public transport.

Police Stations:

As per the Mandeni Local Municipality website, the existing police stations Sundumbili and Nyoni have large areas to service and access to remote areas is arduous. Remote rural and traditional areas of the three Tribal Authorities are particularly difficult to service in this regard. The SAPS indicate they would provide police services to these areas from satellite stations in the appropriate localities. From these satellites they would facilitate community policing efforts in the area to build security. They would train and recruit community police reservists of different designations i.e. active reservists who would undertake a determined number of hours service per month on a regular basis or reservists who would be called upon in times of need.

Hospitals:

As per the Mandeni Local Municipality website, the ILembe family of municipalities including Mandeni falls within the Durban Planning Region of the Department of Health. This region comprises four Health Districts; two of which cover the ILembe area, i.e. Ndwedwe Health District and Lower Thukela Health District. The health care strategy is hospital-centred for each Health District and these hospitals assume responsibility for the outlying clinics within that Health District from a financial, personnel, referral and support point of view. Mobile clinics augment this health care system and also fall under the auspices of the hospitals.

Hospitals are located in Stanger and existing clinics and mobile clinic stops are associated with local service nodes. The Stanger hospital serves a relatively large Health District servicing the Mandeni Municipality, this implies long travel distances for the people. In some instance the Catherine Booth which falls within uMlalazi Municipality is generally accessed by the local community, it can be generally recorded that the is well serviced in terms of the provision of health services.

Summary of Findings Considered Relevant to the Way Forward

- Generally, the infrastructure and accessibility review is perceived as positive and supportive of a tourism coastal and heritage visitor centre development. The road from the N2 at Junction 277 / R66 to the proposed African Village Beach Experience is to be tarred.

- Bulk services available to the area proposed for the African Village Beach Experience will require further investigations as part of the implementation processes.

- Issues of signage and certain road conditions require attention.

- Security and perceptions of security need to be adequately managed.

- Water quality of the lagoon adjacent to the proposed African Village Beach Experience should be tested as to suitability for tourism related water activities.

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7. MARKETING & PROMOTIONAL REVIEW

Market research indicates that tourists seek experiences related to destinations when choosing to visit an area and that socio-political / administrative boundaries have little meaning to them.

It is also considered important, at the outset, to consider the spatial area within the iLembe District Municipality and MLM in terms of tourism opportunities, as well as its interactive relationships with key stakeholders and other tourism management and marketing organisations. These considerations contribute towards determining a framework within which MLM marketing options can be contextualised. It is proposed that the primary objectives of any Marketing Strategy / Plan should be to maximise visitor numbers to the area/venue, and increase their length of stay and spend within it, so as to grow the economic value of tourism, with the resultant increase in job creation.

In terms of MLM area, it must have both 'primary tourism attractions' and 'secondary tourism attractions'. Primary attractions function as the initial pull factor that will maximise visitor numbers, whilst secondary attractions encourage tourists to spend longer periods of time in a destination through the development of activities and events. In terms of tourist facilities, these can encourage tourists to spend more money in the area through the provision of accommodation, restaurant and shopping facilities. It is proposed that an authentic and contemporary African beach experience could serve to extend the length of stay of tourists in the MLM region key destinations (beach and coastal areas), as well as increase their spend at the destination.

The generic marketing of an area therefore needs to prioritise the primary and secondary attractions of the area within its branding.

7.1. Assessment of Marketing Tools

The aim of the following section is to provide a review of marketing tools that are presently being used to market the MLM area. This has been done on a National level, a provincial level, a municipal level and a regional level. The grey boxes suggest some of the questions that the MLM Tourism Strategy would need to ascertain in strategising the marketing plan. In understanding the broader context of the marketing of iLembe District and KwaZulu-Natal as a whole, the areas and opportunities of points of leverage for the MLM Tourism Strategy become apparent.

7.1.1. National Website Marketing Review

www.southafrica.net

On a National scale South Africa is marketed through South African Tourism (SAT). The SAT website is an attractive and easily navigated page; the objective of the website is to market the whole of South Africa. When searching the website there are several search bars including; *Guide to South Africa* | *Where to go* | *What to do* | *Best of South Africa* | *Contact*.

The *Guide to South Africa* bar drops down to a menu including; *South Africa at a Glance* | *Getting around South Africa* | *Destinations* | *Need to Know* | *History of South Africa*. KwaZulu-Natal is listed as a destination. KZN is marketed, from a high level overview, in terms of beaches, mountains, and bush. Mandeni's proposed African beach experience could in future become listed as a destination key beach attraction within the description of KZN's over all beach offering.

The *Where to go* bar drops down to a menu including; *Provinces | Cities | Towns | Top Destinations*. KwaZulu-Natal is listed under provinces. Here there are all sorts of events, activities, restaurants and experiences advertised. Mandeni does not currently feature on this menu. Nevertheless, in future, if successfully conceptualised and implemented, the proposed African beach experience for Mandeni could be listed as a top destination offering, as a feature under a KZN offering, as well Mandeni to feature under towns.

When clicking on *KwaZulu-Natal* within the *Where to go* bar, a long list of options comes up. These have been scanned for relevance to the Project, which include:

- The Dolphin Coast (North Coast KwaZulu-Natal)

Here the North Coast is sold on beaches and Zulu heritage and culture, specifically the King Shaka Route. The North Coast is said to stretch from Zimbali in the south to the Thukela River in the north. This does not strictly include Mandeni. However, reference is made to the Muti Trail which can be followed at Harold Johnson Nature Reserve.

The *What to do* bar drops down to a menu including; *Adventure | Arts | Culture & History | Events | Food & Wine | Leisure & Lifestyle | Responsible Tourism | Routes & Trails | Sport | Wildlife, Safari & Nature*, and there is the option to search *Attractions & Activities. Beaches*, as an activity on its own, does not feature on the What to do bar. This is worrisome as KZN is sold on its beach offerings, therefore one would be unable to access KZN beaches via the activity route. Instead one would have to know to search for KZN. SAT should consider adding *Beaches* to their *What to do* menu. The Project could then feature here.

If the King Shaka Route and the Zulu Heritage Route 66 successfully incorporate Mandeni, then these two routes can be featured under *Culture & History* as well as *Routes & Trails*. There is also potential to be optimised for search in the *Attractions & Activities* bar.

The *Best of South Africa* bar drops down into *Tops 10s | World Heritage Sites | Latest News | People.* The proposed Mandeni African beach experience, if successful could be listed as a Top 10 feature.

This website is interactive and integrates social media interaction and blogging. It is very aesthetically and functionally well designed and houses a wealth of information. Both "iLembe" and "Mandeni" could not be found on the site, when using the search box. Therefore, currently no direct promotion of Mandeni is taking place whatsoever on the SAT website.

Summary of Findings Considered Relevant to the Way Forward

- KWAZULU-NATAL is marketed through BEACHES | MOUNTAINS | BUSH, and yet there is no Beach under the 'What to do' menu.
- Mandeni's African beach experience has the potential to be listed under the following menus:
  - Guide to South Africa > Destinations > Soak up the Sun > African beach experience;
  - Where to go > Top Destinations > African beach experience;
  - Where to go > Provinces (KwaZulu-Natal) > African beach experience;
  - Where to go > Towns > Mandeni;
  - The Dolphin Coast could potentially link to include Mandeni;
  - What to do > SAT to add in Beaches > African beach experience;
  - What to do > Culture & Heritage > King Shake Heritage Route & Zulu Heritage Route 66
  - What to do > Routes & Trails > King Shake Heritage Route & Zulu Heritage Route 66

7.2. Provincial Website Marketing Review

www.zulu.org.za | www.kzn.org.za
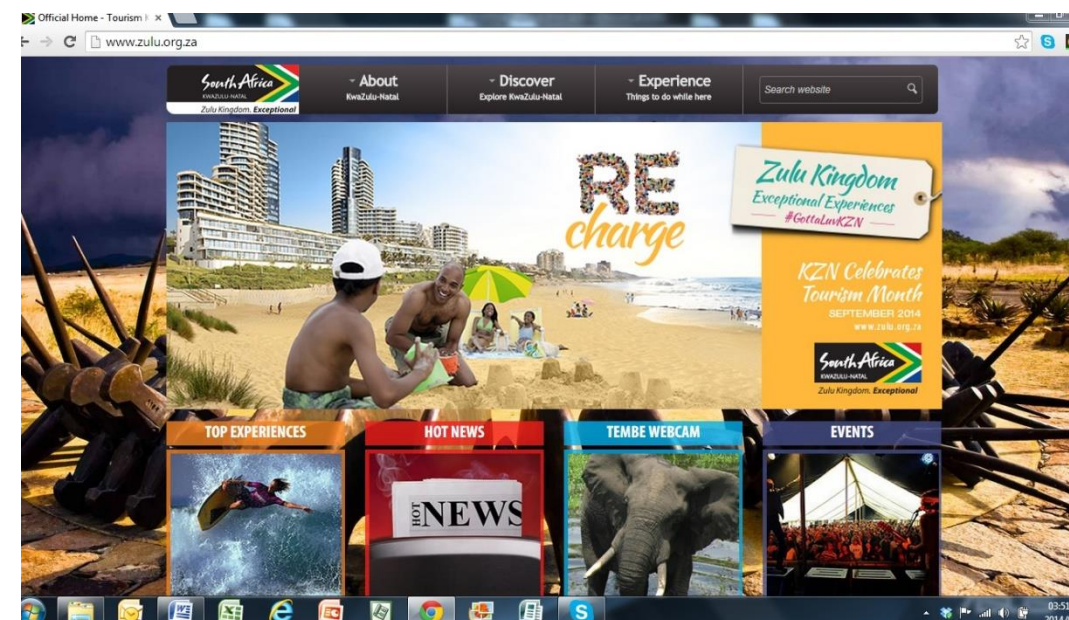
Many websites exist where tourists can access tourism information related to the KZN province. When searching online for "KwaZulu-Natal", however, the first website that comes up, after the Wikipedia website, is www.zulu.org.za. This is the official website of Tourism KwaZulu-Natal (TKZN). TKZN is the official entity responsible for the development, promotion and marketing of tourism into and within the KZN province. The Uniform Resource Locator (URL) for the website was once www.kzn.org.za, however, both URLs still lead to the same website.

When searching the website there are three main menus at the top including;

About KZN, > Key Facts > Tourism Services > About TKZN

Discover KZN > Destination [Battlefields, Drakensberg, Durban, Elephant Coast, Pietermaritzburg & Midlands, North Coast, South Coast, Zululand].

Experience KZN > Experience [Nature, Culture, Restaurants, Events, Accommodation, Packages, Tour Guides, Shopping Centres] > Routes [Midlands, Boston Bulwer Beat, KZN Literature Route, KZN Literature Route, Beer Route, 1000 Hills, The Amble, Freedom Route, Zululand Birding, Southern KwaZulu-Natal Birding, Southern Explorer, Battlefields].

After clicking on the *North Coast* bar, a description of the North Coast as well as a list of offerings appears. The Thukela Mouth is listed here. The Thukela Mouth is marketed by way of walks, fishing, spectacular birdlife, indigenous forest, water sports and endless beaches as well as affordable accommodation. This website represents a good opportunity for marketing and promoting Mandeni's proposed African beach experience.

Both the *Experience* and *Routes* sub-menus of the Experience KZN menu offer potential for Mandeni to market itself by way of *Nature Experience* in the form of a beach experience and *Culture Experience* and *Routes* (cultural King Shaka Route and Zulu Heritage Culture Route 66).

At the bottom of the Home page, there are four sub-menus including:

Top Experiences > *Heritage* > *Adventure* > *Zulu* > *Beach* > *Wildlife*; *Hot News*; *Tembe Webcam* and *Events.*The Project could feature under Heritage, Zulu and Beach. Currently, the offerings under Zulu (culture) are sorely lacking.

This website does have a Facebook page. There is opportunity to promote the Project on their Facebook page by sending them product launch news and a competition to promote on this offering. This website is interactive and optimised for social media interaction and blogging in particular. It is very aesthetically and functionally well designed and houses a wealth of information.

When searching 'Mandeni" in the search box, the only offerings to come up include:

- John Ross Bridge
- Mandeni Swimming Pool

Summary of Findings Considered Relevant to the Way Forward

- The Project has the potential to be listed under the following menus
  - Discover KZN > Destinations > North Coast > Mandeni African beach experience
  - Experience KZN > Nature > Beach > Mandeni African beach experience
  - Experience KZN > Culture > King Shaka Route and Zulu Heritage Culture Route 66
  - Experience KZN > Routes > King Shaka Route and Zulu Heritage Culture Route 66
  - Top Experiences > Heritage > King Shaka Route and Zulu Heritage Culture Route 66
  - Top Experiences > Zulu > King Shaka Route and Zulu Heritage Culture Route 66
  - Top Experiences > Beach > Mandeni African beach experience

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7.3. District Digital and Traditional Marketing Review

www.ilembe.gov.za
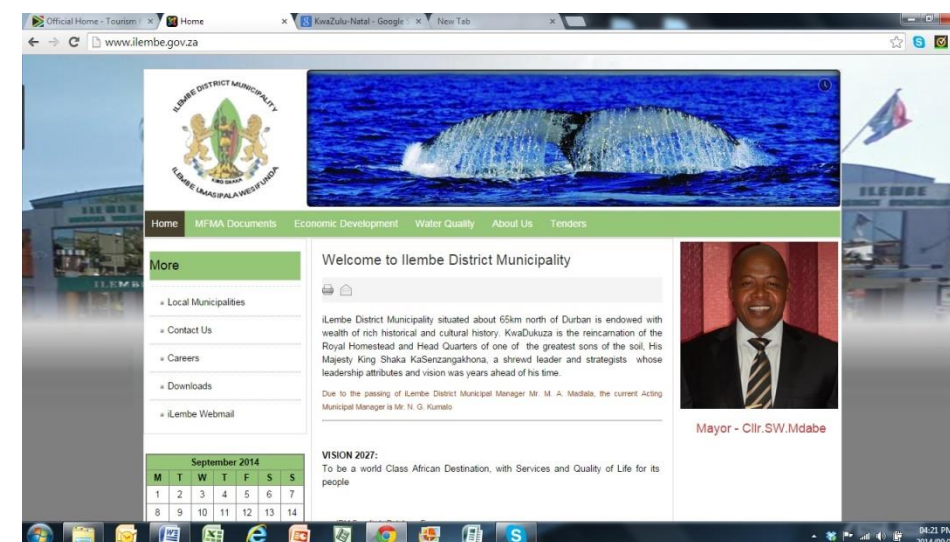
This is the official website for the district municipality of iLembe. It serves to profile the municipality as a public service entity. Its function is not to promote the area in terms of tourism. It does, however, link to Enterprise iLembe (EI), in terms of economic development in the area. It also links to each of the four official local municipality websites; Mandeni being one of them. However, it should be noted that Mandeni is spelled incorrectly as "Mandemi".

www.enterpriseilembe.co.za

Enterprise iLembe is the Economic Development Agency for the iLembe District Municipality responsible for Trade & Investment Promotions and Local Economic Development in the region. The Enterprise iLembe vision is to make iLembe District the Investment Destination of Choice.

The menu bar is broken up as follows;

About Us > _Useful Information_ > _Areas We Service_ > _Our Offices_ > _Board of Directors_ > _Management & Staff_

Invest > _Agriculture_ > _Tourism [King Shaka Heritage Route Destination management Services | Arts & Crafts, Bed & Breakfasts | Ndwedwe Nature Reserves | Zulu Rural Culture (Trail) | Nature Trails | Kwashushu Hot Springs | Nonoti Precinct Project] > Manufacturing > Retail [Digital Hubs and Telecentres | Renewable Energy | Business Process Out-sourcing] > Industrial Property Development > Dube Trade Port_

Projects > _Agriculture_ > _Vineyards & Winery_ > _Tourism_ > _Manufacturing_ > _Retail, Services & ICT_ > _Industrial Property Development_

Destination North Coast > _Welcome_ > _Accommodation and Hospitality_ > _Getting Here_ > _Travel Brochure_

Media Room > _Media Releases & Articles [Newsletters & Latest News]_ > _Research Reports [iLembe Economic Indicators | Survey Reports]_ > _Events [Investor Summit]_

Contact

Documents > _Annual Budgets_ > _Annual Reports_ > _Call for Quotations_ > _iLembe IDP_ > _SDBIP_ > _Supplier Registration_ > _Tenders_ > _Vacancies_

Invest > _Tourism:_ The Projects listed here do not include Mandeni. Furthermore, the description of each is of the potential project, which requires funding to be further developed.

Projects > _Tourism:_ This includes King Shaka Heritage Route, KwaLoshe, KwaShuShu Hotspring and the Establishment of Beach Facilities at Thukela Mouth. The last project mentioned is relevant to Mandeni, and the website reports that the project involves establishing beach recreational facilities at the uThukela Mouth Beach which among others include: Road access and parking area, braai facilities, picnic facilities, kiosks, arts and crafts facilities, ablutions, boardwalks, etc. The objective of this project is to create adequate secure beach facilities to encourage visitors to the area in support of tourism. A basic EIA has been submitted to DAEA, municipality awaiting approval before further work can commence.

Destination North Coast: This section serves to promote the North Coast as a Tourism Destination. However, it is not easily legible. There is a lot of content, and it is not designed for skim reading. As a tourist would not know where to go or what to do. Overall, the design of the website is very corporate. It seems to appeal mostly to existing and potential investors.

Summary of Findings Considered Relevant to the Way Forward

- The Project has the potential to be listed under the following menus
  - Invest > Tourism
  - Projects > Tourism
  - Destination North Coast > As its own Project Listing
  - Destination North Coast > To be included in the Travel Brochure
  - The overall design of the website could have a more colourful, appealing, tourist attracting look and feel. At the moment EI is the main entity for promoting tourism, therefore it should function appropriately.

www.thedolphincoast.co.za

The website reports that the Dolphin Coast extends from Zimbali in the South to the mighty Thukela in the north. It includes the coastal resorts of Ballito, Chakas Rock, Salt Rock, Sheffield Beach, Blythedale and Zinkwazi. At the moment, the map cuts off at Thukela Mouth, therefore Mandeni is not included in the Dolphin Coast. The website really serves to promote accommodation in the area. Nothing is mentioned of Mandeni. This could be merely because Mandeni has very little accommodation, and not necessarily because it is not being included in the Dolphin Coast.
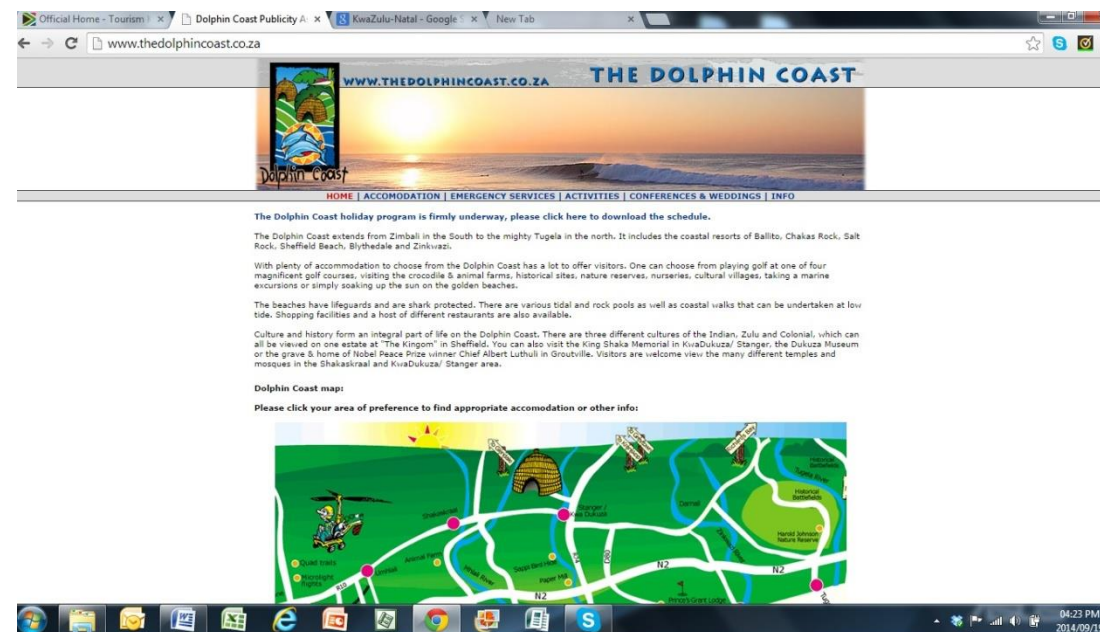
7.4. Local Digital and Traditional Marketing Review

www.mandeni.gov.za
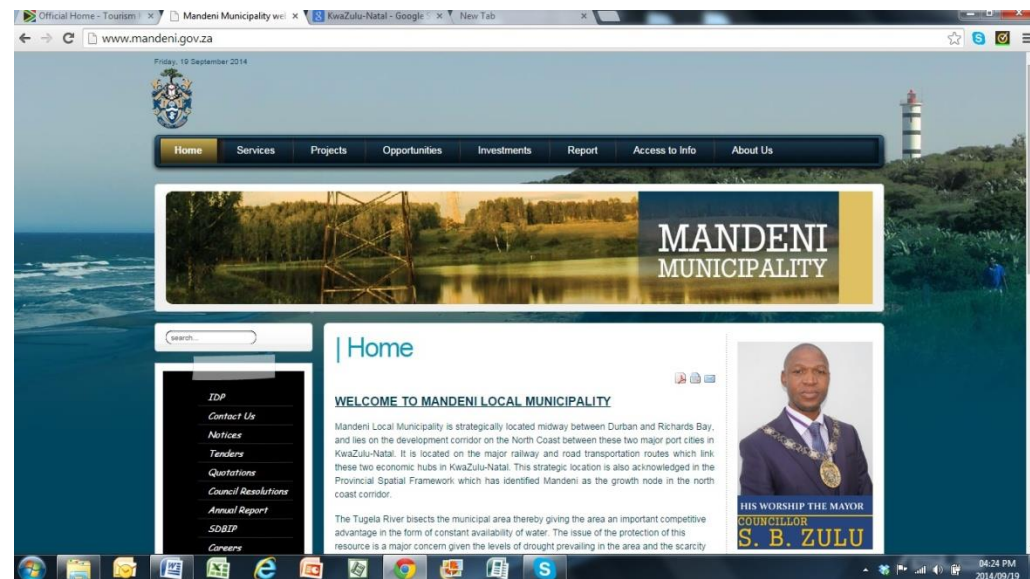
The menu bar is broken down as follows:

Home

Services > Social Services > Educational Services > Health Services > Welfare Facilities > Safety & Security > Sports & Recreation > Cemeteries > Housing > Legislative Mandates

Projects > Municipal Infrastructure > Housing > Local Economic Development > Public Amenities

Opportunities > Bursaries > Quotations > Investments > Funding > Partnerships

Investments > Investment Profile > Economic Opportunities [Agriculture | Manufacturing | Tourism | Education | Other] > 5 Year Development Plan > Investment Policies > Our Profile > LED Strategy

Report > Quarterly Reports > Audit Reports > Oversight Reports > Performance Reports > Annual Reports

Access to Info > Contacts > Budget > IDP > Public Info > Legal / Policies > IWMP > SCM > Finance > LED > Tourism > SDBIP > Turnaround Strategy

About Us > Historical Background > Vision / Mission > Establishment > Political Structure > Departments > Organogram

Tourism falls within Local Economic Development. The only thing under the Local Economic Development sub menu is "A significant number of wards indicated that there is pressing need for LED projects focusing on job creation, poverty alleviation, promotion of SMMEs and co-operatives". This does little to nothing for tourism within Mandeni.

Within the Investment > Tourism tab little is said about actual tourism opportunities within Mandeni.

There is nothing under Investments, Funding or Partnerships within Opportunities.

This lack of information can only reflect that which has happened following the strategic plans of 2000 and 2008. That is; not much. The potential for development is acknowledged, yet there is little by way of action and implementation

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8. SWOT, GAPS & OPTIONS ANALYSIS & VISION

8.1. SWOT

Table 5:Strength, Weaknesses, Opportunities and Threats

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Mandeni is currently (perceived) as affordable.	Poor institutional structuring.	To develop a unique beach offering, in the form of a contemporary African beach experience.	Competition in the form of better beach offerings in the surrounding areas of the north coast and Mozambique
Mandeni is currently targeted at the mid to low income tourists. This is a strength as the MDA indicates that this is a good market to tap into, as this is the market that is seeking the kind of tourism offerings and developments proposed for Mandeni.	Past Tourism Strategies for 2000 and 2008 have not been implemented.	Tapping into a market that is starved for local, affordable and authentic tourism opportunities that they genuinely seek.	Little political will to drive the MLM Tourism Strategy.
Mandeni is on a beautiful stretch of coast, with a host of natural assets such as rivers, estuaries, Nature Reserves, Coastal Parks and stunning sea views.	Poorly developed Tourism Sector. The CTO seems to have very little support.	Possibility of leveraging from the King Shaka Heritage Route and the Zulu Heritage Route 66.	Working with ITB with regards to the Land within the proposed Dokodweni area of development.
Central location; close to the N2. It is very accessible to people living in Durban and the surrounds	Poor state of Nature Reserves.	To develop and provide an authentic Zulu culture and heritage experience.	Perceived and actual levels of crime and safety.
Rich cultural heritage.	Little to no shopping opportunities.	Existing nature reserves that can be revamped and developed to include facilities such as multi-activity trails networks	Enclave tourism development, especially in the form of a typical resort type development.
It is located enroute to the Hhluhluwe Imfolozi Game Reserve.	Little to no accommodation.	To include the locals in tourism development and sustainability.	Continued poor provision of facilities and maintenance of the Nature Reserves.
Amatikulu Nature Reserve is a well-known birding site with a bird list of 300 species.	Limited bars and restaurants.	Stockvel tourism could be used as a means of boosting visitor numbers.	Environmentally sensitive areas.
There are some well-known and popular tourism facilities already in place such as the Prawn Shack.	Poor signage.	Mandeni holds good potential as an adventure tourism destination.	The quality of water in the Amatikulu River and estuary

8.2. PROPOSED VISION

By 2020, Mandeni is the go-to place for an authentic and contemporary African Village Beach Experience, complemented by water and nature based activities. It is a prime tourist destination that has been developed by and continues to be owned by the locals. It is a showcase for successful development, maintenance and operations for sustainable rural tourism.

8.3. GAPS

1.	Community buy-in and support of tourism in the MLM.	It is very important to secure community buy-in and support in order for the proposed tourism interventions, especially the African beach experience to succeed. The community will ultimately shape the characteristics that make the beach experience authentic.
2.	Lack of a legal institutional structure to proceed with the concept planning and development, maintenance and operations of the MLM Tourism Strategy. This institutional structure should be able to make alignments with various stakeholders e.g. National Departments, Heritage Institutions, Provincial, District and Local Municipalities.	To undertake a project of this nature it is essential that a 'Special Purpose Vehicle' (SPV), or some form of 'ring-fenced' legal entity be formed that has legal responsibility / accountability to proceed with the concept planning and development, maintenance and operations of the Project. It is proposed that an SPV be established for the Project. This SPV could include identified members of the community. The founding members of the SPV will attend SPV Member Meetings and will administer, manage, oversee and take strategic decisions regarding the development, maintenance and operations of the Project. This SPV should also be able to enter contracts and secure funding to undertake the project. The recommended SPV will need to seek legal, financial, and operational advice on certain aspects of running the project.
3.	Identify and secure funding	As stated above potential funding partners will need to be identified by the SPV and a Funding Proposal document prepared and presented to those funders who express an interest.
4.	Strategic Alliance Partnerships	The SPV will be responsible for creating strategic alliances with National and Provincial Tourism and Heritage Institutions, government departments; other identified funding institutions e.g. DBSA, National Lottery and appropriate institutions / key stakeholders e.g. District and Local Municipalities and Tourism Units in order to ensure successful developmental and operational implementation of the project. It is recommended that the relationship with EI be maintained as strategic alliance partners in order to assist with identification of further funding institutions such as the IDC etc.
5.	Decision on Operations of the project.	
6.	Strategic Marketing Plan	As part of its operational function, an annual Strategic Marketing Plan will need to be prepared by the SPV, as part of its annual business planning and budgeting processes. It is proposed that the Annual Marketing Strategic Plan be based upon the Outline Marketing Strategy that will be contained within the Phase 3 of the project.
7.	Needs assessment; skills audit; and operational training	The SPV will need to undertake a Needs Assessment and Skills Audit amongst its member organisations in order to determine the resource competency and availability of people who can participate in the variety of employment opportunities that will be required during the formation and early period of the SPV, as well as the developmental and operational phases of the Project. After which, specific Training Programmes can be determined and call for proposals from training entities can be called for. It is recommended that operational training be conducted in parallel with the developmental stages, so as to ensure resources are fully trained upon commencement of operations.

8.4. PROPOSED OPTIONS

The following images start to depict the visual inspiration for the proposed African Beach Experience for Mandeni. This will be further developed in the Phase 2 Report.

8.5. KEY STRATEGIC OBJECTIVES

Based upon the Gap and Options analysis the following Key Strategic Objectives (KSOs) are recommended for development within the subsequent Phases.

KSO 1: Institutional Structuring

KSO 2: Financial and Economic Analysis & Funding Strategy

KSO 3: Strategic Alliance Partnerships

KSO 4: Empowerment, Training & Skills Development Programmes

KSO 5: Development & Operations

KSO 6: Marketing Strategic Plan

9. REFERENCES

This is to be completed in the final Report prior to conclusion of the assignment.