STRATEGY FRAMEWORK REPORT- DEVELOPMENT OF A TOURISM SECTOR STRATEGY AND IMPLEMENTATION PLAN FOR ULUNDI LOCAL MUNICIPALITY

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1. INTRODUCTION

Ulundi Local Municipality is a local municipality located on the southern boundary of the Zululand District Municipality in north-eastern KwaZulu-Natal. It is one of the cluster of five Municipalities that form the Zululand District Municipality. The Ulundi Local Municipality area is approximately 4 185km. It is a mainly rural municipality that encompasses the town of Ulundi. Ulundi town is the only urban area in the municipal area and therefore plays an important role in the provision of social, economic and tourism facilities to the population of Ulundi. A number of tourism activities and places of interest are located in and around Ulundi, these include game reserves, historical/cultural sites, cultural events and guest lodges.

Tourism offers specific potential for local entrepreneurs and businesses. However, the opportunities are not fully reached or exploited and need to be unlocked and appropriately focused on niche markets for the full benefit of local communities.

The process of the development of the tourism strategy has been divided into five work phases. The phases are as follows:

Work Phase One: Project Orientation and Inception

In this phase, the tourism industry of Ulundi is initially reviewed, and the work plan for strategy formulation is developed and detailed.

Work Phase Two: Contextual Analysis (Current)

In this work phase, the current tourism status quo of the Local Municipality are reviewed. Key policy and legislation relevant to tourism in Ulundi are also addressed. This phase includes:

     o Situational Analysis (including policy and programme review)

     o Destination Situational Analysis

     o SWOT and Gap Analysis.

Work Phase Three: Tourism Strategy (Current)

This report deals with this phase of the project:

In this work phase, strategies to plan for the development the tourism sector both to contribute to the local economy, and to contribute to the overall socio-economic status of the local municipality are suggested. These are packaged in projects/ interventions, which were tested with the PSC, and tourism stakeholders at a workshop held on the 12th February 2014.

Work Phase Four: Project Design Phase

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This work phase is where 5 prioritised projects will be identified using the prioritisation matrix in a workshop with the PSC.

Work Phase Five: Implementation Plan

This phase addresses the projects earlier identified and unpacks an action plan in terms of actions, timeframes, roles, and responsibilities, and monitoring and evaluation.

Work Phase Six: Close Out Report

This work phase is administrative in nature, and closes off the entire planning process which, hereafter, will be launched into implementation.

1.1. PURPOSE OF THE REPORT

The current report forms the third of six work phases as listed above. It is the tourism strategy framework, and its purpose is to provide the framework within which tourism in the municipality will be developed. The following points list the main purposes of this document:

- ✓ To review the key situational analysis findings, which will have an impact on the strategy going forward.
- ✓ To provide a framework for tourism development in the municipality
- ✓ To provide preliminary projects which will pre-empt more project ideas from stakeholders

1.2. METHODOLOGY

The Ulundi Municipality tourism strategy has been developed following on from the findings of the contextual analysis. The contextual analysis itself was formulated after having conducted a desktop research study of national, provincial and local tourism legislation, policy and strategy as well as secondary and primary data on all major influences of the Municipality's tourism system. In addition, extensive consultation with key stakeholders- including tourists, product owners and relevant tourism institutions was conducted. This enabled a systematic assessment of each element of the Municipality's tourism system, such that the whole system was addressed.

Following this background research, a list of strengths, weaknesses, opportunities and threats (SWOT) was extracted from the analysis, which gave rise to the gaps and opportunities on which the will be strategy will be built. The following tourism strategy formulation document is therefore based on Ulundi's the gaps and opportunities, and represents the bridge between the SWOT of the current tourism system, and the vision of the potential future tourism system. The strategic conclusions of this report will are packaged into potential actions or projects, which will be developed in detail in the work phases following the strategy formulation.

1.3. STRUCTURE OF THE REPORT

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The report is structured as follows:

Section One: Introduction (current section)

This section provides the direction and purpose of the report.

Section Two: Overview of Key Strategic Findings from Situational Analysis

This section discusses the key findings from the situational analysis which will guide the strategic direction of the tourism strategy, and eventually the strategic interventions for tourism in Ulundi.

Section Three: Strategic Framework

This section discusses the strategic framework for tourism in the Municipality.

Section four: Summary of strategies, goals and projects

This section summarises the preliminary projects for tourism in the Municipality.

Section Five: Conclusion

This section concludes the report

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1. RECAPPING KEY STRATEGIC FINDINGS FROM SITUATIONAL ANALYSIS

The purpose of the following section is to set the foundation for the rest of the document. In this section the SWOT identified in the situational analysis is reiterated. Throughout the contextual analysis report it was mentioned that the SWOT analysis will feed into strategic actions for the Strategy formulation. All the SWOT points taken from the Situational Analysis can be clustered into key strategic issue areas

These include:

- ✓ **LACK OF PRODUCTS, AND MUCH PRODUCT DEVELOPMENT OPPORTUNITY**
- ✓ **KEY INFRASTRUCTURE DETERIORATION HAMPERING TOURISM GROWTH**
- ✓ **UNTAPPED BUSINESS AND UNREACHED INTERNATIONAL MARKETS, AND RESULTING POTENTIAL MARKETING OPPORTUNITIES**
- ✓ **WEAK TOURISM RECEPTION DUE TO LOW PUBLIC AREA CLEANLINESS AND BUSINESS SERVICE LEVELS**
- ✓ **KEY TOURISM ENABLING STAKEHOLDERS REQUIRING CAPACITATION, CLARIFICATION OF ROLES REQUIRED FOR DISTRICT AND LOCAL MUNICIPALITY, AND PUBLIC PRIVATE RELATIONS REQUIRING ATTENTION**

2.1. STRATEGIC CLUSTERING OF SWOTS

The tables below recap the SWOT from the contextual analysis. In the strategy formulation, these strategic areas will be utilised such that strategic opportunities are extracted from the SWOT are incorporated into the vision, goals, strategies, and action/ potential projects.

- ✓ **LACK OF PRODUCTS, AND MUCH PRODUCT DEVELOPMENT OPPORTUNITY**

STRATEGIC INTERVENTION AREA: PRODUCT DEVELOPMENT	
KEY ISSUE: Lack of Products, and Much Product Development Potential	
WEAKNESS	Lack of tourism activities
WEAKNESS	No accommodation establishments on site public environmental conservation areas to ensure round the clock nature activities.
WEAKNESS	Most activities after hours are on site private establishments, and underutilised.
WEAKNESS	Close to no tourism activities are open after 4pm
WEAKNESS	There are no car hire companies in the municipality
WEAKNESS	Only two shuttle companies exist in the LM at present
WEAKNESS	There is minimal variety of eating establishments in town
WEAKNESS	Apart from two billboards along the R66, marketing of FedAir on Ulundi/ ZDM is limited.
WEAKNESS	The municipality has not played a direct enough role in heritage management, funding and identification of heritage tourism opportunities; in support of Amafa

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STRATEGIC INTERVENTION AREA: PRODUCT DEVELOPMENT	
KEY ISSUE: Lack of Products, and Much Product Development Potential	
THREAT	The development of environmental conservation may be undercut by the fact that Hluhluwe Imfolozi Park, which is quickly and easily accessible, provides more developed and well established facilities, is bigger, and has the Big Five. Tourists may opt to go to HIP instead. Therefore conservation facilities in Ulundi should offer differentiated conservation products, with experiences which cannot be accessed at HIP.
THREAT	Poaching; conservation strength of Municipality is in its conservation areas, particularly one of which suffers from Rhino Poaching
THREAT	During peak season, there is a lack of accommodation establishments.
THREAT	Dissension between the public and private sector in tourism development.
THREAT	Exorbitant prices charged for transport and these companies do not have credit card/ electronic facilities for payment.
OPPORTUNITY	Discussions with the Royal Family to establish potential linkages with the Royal Dance
OPPORTUNITY	Adventure activities, which the market requested during interviews
OPPORTUNITY	Township tourism activities which do not currently exist
OPPORTUNITY	Adventure activities around the Black and White Umfolozi River
OPPORTUNITY	Development plans for the tourism hub indicate that the airport will also be established as a leisure area in the near future.
OPPORTUNITY	Potential through the airport to develop restaurants, and other entertainment, through the tourism hub.
OPPORTUNITY	Untapped unique cultural and historical heritage resources, e.g.: The development of the Anglo Zulu War original site (Ondini Battle Field) as a signature marketing area for Ulundi.
OPPORTUNITY	Organizing of a signature heritage event like the Battle of Ondini Commemoration
OPPORTUNITY	Establishment of tourism info centre with an art and craft centre in partnership with the local community for sustainable community beneficiation
OPPORTUNITY	Development of Cengeni gate as a to be a full service tourist gate
OPPORTUNITY	New flight route from Jhb to Phinda via Prince Mangosuthu Buthelezi Airport (this presents opportunities for entertainment of guests through Zulu dancing, providing refreshments to guests, etc.).
OPPORTUNITY	Zulu dancing at Airport (already dance groups are inquiring about this opportunity)
OPPORTUNITY	The development of a car hire facility
OPPORTUNITY	Tour guides to entertain guests for 3-4 hours, based on airline flight schedules and routes
OPPORTUNITY	The installation of banking facilities at Prince Mangosuthu Buthelezi Airport, as more flights are scheduled
OPPORTUNITY	More involvement with private sector through inviting them to participate at planning meetings
OPPORTUNITY	Walking trails through overnight stays in townships, as well as activities along the trails (particularly for international visitors).
OPPORTUNITY	The legislature building being used as a theatre facility for Zulu theatre (musicals, performances, dancing, etc.)

✓ **KEY INFRASTRUCTURE DETERIORATION HAMPERING TOURISM GROWTH**

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STRATEGIC INTERVENTION AREA: INFRASTRUCTURE	
KEY ISSUE: Key Infrastructure Deterioration Hampering Tourism Growth	
THREAT	Insufficient funding to upgrade environmental conservation facilities
THREAT	R66 deterioration in the north defers international tourist busses from entering the District

✓ **UNTAPPED BUSINESS AND UNREACHED INTERNATIONAL MARKETS, AND RESULTING POTENTIAL MARKETING OPPORTUNITIES**

STRATEGIC INTERVENTION AREA: MARKET AND MARKETING DEVELOPMENT	
KEY ISSUE: Untapped Business and Unreached International Markets, and Resulting Potential Marketing Opportunities	
STRENGTH	Ulundi role as a business and governmental service node
STRENGTH	Stream of potential tourists entering the municipality
WEAKNESS	Tourism marketing websites do not report on Prince Mangosuthu Buthelezi Airport

✓ **WEAK TOURISM RECEPTION DUE TO LOW PUBLIC AREA CLEANLINESS AND BUSINESS SERVICE LEVELS**

STRATEGIC INTERVENTION AREA: TOURIST RECEPTION	
KEY ISSUE: Weak Tourism Reception Due to Low Public Area Cleanliness and Business Service Levels	
WEAKNESS	Poor service delivery by businesses in the local municipality, which is reported to deter tourists

✓ **KEY TOURISM ENABLING STAKEHOLDERS REQUIRING CAPACITATION, CLARIFICATION OF ROLES REQUIRED FOR DISTRICT AND LOCAL MUNICIPALITY, AND PUBLIC PRIVATE RELATIONS REQUIRING ATTENTION**

STRATEGIC INTERVENTION AREA: TOURISM AND TOURISM RELATED INSTITUTIONS	
KEY ISSUE: Key Tourism Enabling Stakeholders Requiring Capacitation, Clarification of Roles Required for District and Local Municipality, and Public Private Relations Requiring Attention	
WEAKNESS	Capacitation challenges of the Municipality
THREAT	Decision makers not understanding the benefits of tourism, and prioritising other needs of the municipality
THREAT	Lack of funding for development of projects by the local municipality
THREAT	A lack of power by the local municipality to implement projects; unfunded mandate
THREAT	Overlapping responsibilities between the District and Local level

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2. STRATEGY

3.1. VISION

The strategic direction of tourism in the Municipality must be guided by a tourism vision. Based on the visions of tourism stakeholders, including local product owners and tourism planners, and tourism related district and provincial government departments, as well as the SWOT of the Municipality, the vision for tourism development in Ulundi is for Ulundi:

"TO BE THE <u>GATEWAY</u> TO THE CORE OF <u>ZULU CULTURE</u> AND <u>HERITAGE</u>"

This is in line with the KZN Provincial Tourism Strategy, which recommends that on a provincial level, Zululand be marketed as the area where the Province's main heritage experiences can be accessed.

- ✓ Importantly, the word **<u>gateway</u>** refers to the presence of Prince Mnagosuthu Buthelezi Airport
- ✓ The words **Zulu culture**, refer to Zulu cultural offerings found in the municipality, while
- ✓ **Heritage** refers to the rich Zulu Heritage conserved in the municipality which the tourist is able to explore when visiting.

3.2. STRATEGIES, GOALS AND PROJECTS

The following sub section unpacks strategies which have been derived from the current SWOT of the local municipality, and therefore directly address the current issues of Ulundi's tourism.

3.2.1. STRATEGY ONE: Marketing of Ulundi Municipality to ensure attraction of new leisure markets (Marketing and Market development)

This strategy deals with attracting specific markets through strategic marketing. The Situational Analysis research indicated that there is much potential to attract new leisure markets. Most of this potential, where domestic tourism is concerned, lies with tourists that are already arriving in the municipality on business. The challenge is to convert these business tourists into leisure tourists as well, by capturing their interest when they are already in the municipality. This strategy, and its goals and interventions addresses creative ways on how to achieve this; how to create new leisure markets out of existing business markets as the initial market catchment, which then would multiply leisure tourism figures in Ulundi as they invite family and refer friends. The strategy also addresses the competitive advantage that Ulundi has in so far as Zulu heritage is concerned. The situational analysis highlighted that there is a growing South African segment of "New Horizon Families", who are often interested in heritage products. This strategy recommends that they are targeted- particularly those, throughout the country, of Zulu descent- through marketing Ulundi, as well as Nongoma as "self-discovery" destinations. This requires marketing of the heritage products, such that they are attractive to South Africans as well. This strategy is therefore aligned, in this regard with the KZN Provincial Tourism Master Plan, which recommends that this region be marketed as a heritage tourism region. Lastly, the strategy addresses international tourists by recommending that

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tour bus companies are actively sought, after the roads into the Municipality, and those within it are fixed.

MARKETING OF ULUNDI MUNICIPALITY TO ENSURE ATTRACTION OF NEW LEISURE MARKETS (MARKETING AND MARKET DEVELOPMENT)	
Goal:	**Convert existing business tourists into business-leisure tourists**
Project/ Intervention1:	Ensure branding is market driven: Intentionally market Ulundi as a business and leisure destination, by including this in branding.
Project/ Intervention2:	Create packages between products and market with special offers to local tourists. Create marketing campaign specifically for business tourists, and encourage establishments to offer free leisure days for a set number of business days spent in Ulundi.
Goal:	**Ensure Ulundi, in correspondence with other locations in Zululand (particularly Nongoma) is perceived by South Africans throughout the country as a destination to discover Zulu history.**
Project/ Intervention1:	Market Ulundi (in partnership with Nongoma Local Municipality) at trade shows, and gateways into the province, as well as television shows such as Sho't Left in locations throughout South Africa with high Zulu populations of "New Horizon Families"; e.g. Gauteng, Durban and Pietermaritzburg.
Project/ Intervention2:	Sub brand Ulundi, in conjunction with Nongoma, as a destination for Zulu people to go on heritage/ "self"-finding holidays. Brand using phrases such as "Zazise Umlando Wakho", "Yazi Umlando Wakho"; "Zithole"; Yazi Usiko Lwakho"; "Zazise Usiko Lwakho", etc.
Goal:	**Increase international tourist visits to Ulundi**
Project/ Intervention1	When R66 and traffic circle is fixed, assist CTO, in representing Amafa as the heritage custodian to contact tour bus companies to arrange visits to Ulundi's heritage sites. Ensure this occurs after the traffic circle into the UMgungundlovu Multimedia Centre is made accessible for busses.
Project/ Intervention2:	Liaise with TKZN (arrange meetings, contact and provide advertising material) for marketing of Ulundi Municipality as a destination, in conjunction with Nongoma Municipality, for international tourist to discover Zulu culture.
Project/ Intervention3:	Ensure that heritage sites are packaged. Assist CTO in linking and packaging products together (along with products external to Ulundi Municipality) such that a day's experience is offered.
Goal:	**Leverage off Prince Mangosuthu Buthelezi Airport as a marketing drawcard**
Project/ Intervention1	Ensure Prince Mangosuthu Buthelezi Airport, including new routes, and entertainment component are included in marketing material.
Project/ Intervention2:	Search tourism websites; national and international, and request that Prince Mangosuthu Buthelezi Airport be recorded as transport facility, in addition to King Shaka and Richard's Bay Airports (as well as others in the Province).
Project/ Intervention2:	Together with FedAir and Ulundi CTO, facilitate the distribution of pamphlets and brochures advertising the Airport at establishments throughout Zululand, Durban and Pietermaritzburg.
Goal:	**Leverage off Emakhosini Ophathe Heritage Park as a marketing drawcard**
Project/ Intervention1	Ensure Emakhosini Ophathe Heritage Park is included in key marketing material.
Project/ Intervention2:	Together with Amafa, EKZNW and Ulundi CTO, ensure marketing material

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	is available at all establishments, and facilitate their distribution throughout the District.
Goal:	**Resuscitate Sports Tourism Markets in Ulundi**
Project/ Intervention1	Seek agreements and contracts with key sports teams throughout the province for games to be hosted in Ulundi.
Project/ Intervention2:	With upgrade of Stadium, market Ulundi as a destination for sports teams in the province (specifically soccer), and offer packages with accommodation and tourism attractions.

3.2.2. STRATEGY TWO: To increase available tourism offerings in Ulundi Municipality (Product development)

This strategy addresses product development, mainly through utilising Ulundi's ripe opportunities as triggers for the development of new products. The strategy addresses the gaps in products highlighted in the Situational Analysis; mainly the mismatch of tourism products with the current potential market, the need for evening, and adventure activities, the need for development of Ulundi's nature conservation areas into niche products (in light of HIP), and the need for the development of supporting tourism products. Much focus is placed on the competitive advantage supplied by the presence of Prince Mangosuthu Buthelezi Airport, and opportunities surrounding this (Zulu dancing, tour operating, low key entertainment hub, etc.) Ulundi's status as a former government capital is of much use in product development, as much of the basic infrastructure needs required for the development of products are already available in the Municipality (internal roads, the availability of a theatre facility, etc.). This strategy is particularly important, as it is the main attraction to the municipality for tourists. Therefore much priority will be placed on it. The strategy is therefore aligned to the KZN Provincial Tourism Strategy, where targets are for the:

✓ Improvement niche tourism experiences
✓ Growth of the domestic market at 5.5% by 2015, for heritage experiences, and domestic business tourists at 60%.
✓ Mainly the SADC market is targeted to grow at 11% for niche tourism
✓ The overseas market is targeted to grow at 15% for heritage and cultural tourism
✓ Development of new accommodation & 'spend' facilities within heritage experience locations
✓ Integration of heritage within /across core experiences
  o Take battlefields experiences into mainstream desirable general interest experience and link to core experiences
  o Incorporate heritage & cultural emphasis into all product development and services – part of tourism awareness, service excellence and development facilitation.

TO INCREASE AVAILABLE TOURISM OFFERINGS IN ULUNDI MUNICIPALITY (PRODUCT DEVELOPMENT)	
Goal:	**Provide innovative tourism products according to key opportunities in**

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	Ulundi Municipality
Project/ Intervention1:	Explore river rafting, and other water sports opportunities along Black and White Umfolozi Rivers.
Project/ Intervention2:	Develop township tour route.
Project/ Intervention3:	Facilitate use of the Legislature Building as a theatre facility for Zulu theatre (musicals, performances, dancing, etc.).
Project/ Intervention4:	Organize the Battle of Ondini Commemoration as (one of the) signature heritage events of Ulundi Municipality. Incorporate other important battles, such as the battle of KwaNhlophenkulu, KwaCeza and KwaNdunu (in collaboration with Nongoma Municipality)
Project/ Intervention5:	In conjunction with Zululand DM, assist with development of Prince Mangosuthu Buthelezi Airport into an entertainment hub.
Project/ Intervention6:	Development of Cengeni Gate into a full service tourist gate.
Project/ Intervention7:	In conjunction with FedAir as the Prince Mangosuthu Buthelezi Airport flights operator, organise regular Zulu dancing at Prince Mangosuthu Buthelezi Airport, which will correspond with leisure flight routes and schedules.
Project/ Intervention8:	In conjunction with FedAir as the Prince Mangosuthu Buthelezi Airport flights operator, facilitate the availability of tours within Ulundi, which will correspond with leisure flight arrivals; based on routes and schedules.
Project/ Intervention9:	Facilitate development of walking trails through overnight stays in townships, as well as activities along the trails (particularly for international visitors).
Project/ Intervention10:	KwaCeza Caves development; the development of hiking trails and homestay accommodation in KwaCeza, with community based arts and crafts facilities.
Project/ Intervention 11:	Facilitate the development of a caravan/ camping park in the Municipality.
Goal:	**Encourage the availability of activities after average working hours, for visiting professionals**
Project/ Intervention1:	Assist with the implementation of night drives, where possible, at conservation areas throughout the Municipality.
Project/ Intervention2:	Facilitate and assist with (in conjunction with Zululand DM and FedAir) low key entertainment at Prince Mangosuthu Buthelezi Airport after hours (e.g. screenings, low key events, dinners, etc.). Strongly explore the possibility of including a cinema facility at the Airport.
Project/ Intervention3:	Development of an arts and crafts exhibition centre, with coffee shop, poetry and arts exhibitions in evenings. Also ensure the display of arts and crafts from Ulundi artists.
Goal:	**Provide assistance to EKZNW (and Amafa) in infrastructure development, prioritisation of services, and marketing, for the development of Ulundi's conservation areas into niche tourism attractions.**
Project/ Intervention1:	Liaise with EKZNW to develop plan of support by Ulundi Municipality and Ulundi CTO for Matshitsholo Community Conservation Area.
Project/ Intervention2:	Liaise with EKZNW to develop plan of support by Ulundi Municipality and Ulundi CTO for Mcakwini Community Conservation Area.
Project/ Intervention3:	Liaise with Amafa and EKZNW to develop plan of support by Ulundi Municipality for the responsible tourism upgrade of Emakhosini-Ophathe Game Reserve, including problem of poaching as a matter of urgency
Project/ Intervention4:	Conduct public infrastructure and services audit of private conservation

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	areas in the local municipality, and develop plan to provide support for them. Include marketing plan by Ulundi CTO. (This includes Geleijk Water Conservation Area, Leopard Rock Reserve, Eagle View Reserve, Matatane Conservation Area, Babanango Private Nature Reserve and Mawana Game Reserve).
Project/ Intervention5:	Conduct niche tourism potential study, for nature reserves throughout Municipality (such as hunting, bird watching, species tracking, etc.), to assist in developing Ulundi attractions into niche attractions. This requires collaboration with EKZNW for an understanding of the unique environmental attributes of each conservation area.
Goal	**Developed tourism support products which are important to tourism functioning**
Project/ Intervention1:	Facilitate the establishment of a car hire facility
Project/ Intervention2:	Assist where necessary in the installation of banking facilities at Prince Mangosuthu Buthelezi Airport (as more flights are scheduled).
Goal	**Tourism activities available in the local municipality during Reed Dance season to increase attractiveness of the Reed Dance as a packaged destination**
Project/ Intervention1:	Interact directly with Royal Household for an understanding of concerns around activity during the Reed Dance period, and to discuss potential ideas around product offering in this time.
Project/ Intervention2:	Liaise with Nongoma Local Municipality to jointly table potential attractions and events; e.g. tours, parties, etc. for Reed Dance period. Incorporate into marketing of Ulundi Municipality.
Goal	**The resuscitation of Sports Tourism in Ulundi Municipality, through the Ulundi Regional Stadium**
Project/ Intervention1:	Upgrading of the Stadium, in collaboration with the Community Services Unit
Project/ Intervention2:	Through the Ulundi Municipality Community Services Unit, ensure regular priority funding is placed aside for regular maintenance of the Ulundi Regional Stadium, in order to ensure attractiveness of the stadium as a destination.

3.2.3. STRATEGY THREE: Development of Tourism Infrastructure in the Municipality (Infrastructure)

The success of the product development, and therefore the success of the strategy is partially dependent on the availability of key infrastructure. Attraction of international tourists is definitely highly dependent on this, where the R66 is concerned. The strategy recommends both short term and long term solutions for this, where in the short term temporary fixing of the R66 is conducted, through Expanded Public Works Programmes. This will create temporary employment, and community participation along the road. Due to much of the damaged portion of the R66 being located in Nongoma Municipality, liaison with Nongoma Municipality is required, and Nongoma Municipality may need to be the primary custodian of this. This strategy recommends that in the long run, both municipalities, and the District, lobby the DOT for prioritisation of this road. Other road infrastructure is also included in this strategy, as well as key tourism infrastructure such as signage and information centres. Particularly, the development of a tourism information office at the tourism hub built at the Airport is important, and is included in the strategy.

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DEVELOPMENT OF TOURISM INFRASTRUCTURE IN THE MUNICIPALITY (INFRASTRUCTURE)	
Goal	**To see road infrastructure being prioritised in and surrounding the local municipality**
Project/ Intervention1	Lobby KZN DOT for the repair of the R66, together with Zululand DM
Project/ Intervention2	In collaboration with Nongoma LM, and EPWP (or similar programme), and in consultation with the KZN DOT develop intervention for regular filling of potholes with temporary material, until permanent repair of the R66 by KZNDOT. Facilitate community involvement by providing temporary employment to locals.
Project/ Intervention3:	In partnership with tourism product owners or official custodians (e.g. Amafa), facilitate and contribute to improvement of entrance roads into key tourism products such as uMgungndlovu Multi Media Centre and Battle of Ulundi Monument, where entrance roads are unsuitable for small cars, or are generally unkempt.
Project/ Intervention4:	Consult and Lobby with KZN DOT for the upgrade of the R68 into Babanango to encourage upgrade of Babanango Town (currently has potholes and requires lighting, and retarring in some locations).
Goal	**Develop key supporting infrastructure such as signage, information and tourist facilities in all key areas in the local municipality**
Project/ Intervention1:	Establishment of tourism information centre info centre in Ulundi Town opposite the Legislature Building, and a satellite office at Prince Mangosuthu Buthelezi Airport, both with an art and craft centre in partnership with the local community Place the tourism information centre at the Airport until the building in town is ready.
Project/ Intervention2	Conduct comprehensive signage audit of Ulundi LM, seek funding and install signage throughout the Municipality.
Project/ Intervention3:	In conjunction with technical services department, erecting of street lights throughout key tourism nodes in the Municipality; mainly Ulundi Town and Babanango Town.

3.2.4. STRATEGY FOUR: Improve tourist reception in the Municipality (Hospitality)

This strategy addresses the issue of hospitality in the local municipality, both with regards to service levels, and cleanliness. This strategy is important for maintaining visitor levels once they have been attracted to the local municipality. At present, training of tourist products and other products in service levels is conducted, but there is no formal feedback system for tourists to report bad service levels. This strategy addresses this. It also addresses the issue of the cleanliness of Ulundi Town, as the main service node for tourism, such that communities are able to get involved, and jobs can be created. A drive to ensure cleanliness of the town is recommended.

IMPROVE TOURIST RECEPTION IN THE MUNICIPALITY (HOSPITALITY)	
Goal	**Improve service delivery levels in Ulundi**
Project/ Intervention1:	Continue to provide service level training for tourism products, as well as non-tourism products throughout Municipality. Target key shopping centre outlets, and involve outsource training to specialist firm.
Project/ Intervention2:	Provide written complaint facility for tourists at key tourist centres; such as Ulundi Tourism Hub, which allow tourists to complain about service at specific establishments/ shopping facilities. Develop system where complaints are daily checked, and where Ulundi LM intervenes, or refers to the Consumer Rights Protection Unit at DEDT. Ensure that tourism

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	products are aware of this system, and receive their input before implementation.
Goal	**Provide a clean Municipality which will attract tourists to use its services**
Project/ Intervention1:	Implement "Keep Ulundi Clean" campaign, including the provision of visible bins throughout the town, and signage (billboards, signage at bus stops, etc.), as well as litter pick up drives throughout the town, and general community awareness about the impact of littering on tourism in the town.
Project/ Intervention2:	Conduct service infrastructure audit of key public attractions, in order to assist custodians to address them (e.g. state of toilet facilities, availability of ramps and rails, etc.).
Project/ Intervention3:	Place "Welcome to Ulundi" signage at key gateway entrances into the municipality.

3.2.5. STRATEGY FIVE: Effectivisation of existing Institutional Structures (Institutions)

This strategy is important for the enabling of the tourism system. Without an effective institutional structure, tourism development will be hampered. This strategy directly addresses issues identified in the Situational Analysis, particularly with regards to the overlapping roles of the District and Local Municipality tourism units, where it is advised that clear roles are laid out for both units, and a procedure or system agreed upon by both parties is followed where tourism development is conducted. Interactive capacitation of key decision makers is recommended, such that the value of tourism is emphasised. Where CTO membership is low, partially due to the fact that the CTO administration is perceived as being inefficient by me product owners, the strategy recommends that a clearly visible CTO office is provided at the hub, with a CTO employee being made available at certain hours to directly handle administration thereof. This is recommended to increase the tourism product trust, and their perception of the effectiveness and necessity of a CTO. The strategy also includes a recommendation for the improvement of private sector and public sector communication, although it is expected that private sector interest will increase with a perceived increase in tourism development.

STRATEGY FIVE: EFFECTIVISATION OF EXISTING INSTITUTIONAL STRUCTURES (INSTITUTIONS)	
Goal	**Encourage key decision makers to perceive tourism as a vital and priority economic sector**
Project/ Intervention1:	Invite councillors and EXCO members for interactive tourist tour of Ulundi Municipality, informed by the economic benefits of tourism. Stop at tourism attractions which have provided high levels of employment and GVA, and also highlight needs of tourism in the Municipality in general.
Project/ Intervention2:	Ensure that interactive tourism training is funded for and included in council induction process.
Goal	**Encourage effective communication and harmony between key institutional tiers in Ulundi Tourism**
Project/ Intervention1:	Meeting with Ulundi LM and Zululand District to understand roles of all key stakeholders, particularly around key infrastructure.
Project/ Intervention2:	Decide on procedures to be followed, together with Zululand DM, in developing tourism in Ulundi Municipality, such that if any stakeholder is to be interested in developing products in the municipality, a clear set of procedures is available.

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Project/ Intervention3:	Facilitate more involvement with private sector through inviting them to participate at planning meetings, or by joining existing planning meetings held by Zululand DM
Project/ Intervention4:	Provide training for Ulundi Municipality employees on effective sourcing of funding.
Project/ Intervention5:	Resell CTO to private sector to encourage more sign ups. Aim for 80% of products registered with CTO. Explore possibility of availability of (potentially part time) employee of Ulundi CTO, available at tourism office, where product owners are able to interact and register directly with visible CTO, to assist with improvement of perceived efficiency.

3.2.6. STRATEGY SIX: Ensure Responsible and Effective Tourism Development (Cross Cutting Development Principles)

This strategy is important to ensure that the strategy is responsible, and effective. It addresses issues such as skills development and community development, through community ownership, or ownership by entrepreneurs in the community. Close ties are required, for this strategy, with institutions directly in this field, such as CATHSETA and Umthashana FET College.

STRATEGY SIX: ENSURE RESPONSIBLE AND EFFECTIVE TOURISM DEVELOPMENT (CROSS CUTTING DEVELOPMENT PRINCIPLES)	
Goal	**Ensure community development is integral in tourism development**
Project/ Intervention1:	Where projects are initiated by the Municipality, ensure project ownership is transferred to communities. Ensure that from the onset, projects are designed for community ownership, or ownership by community entrepreneurs.
Goal	**Ensure tourism skills development is incorporated into tourism development**
Project/ Intervention1:	Train guides for river rafting, and other water sports opportunities along Black and White Umfolozi Rivers, once project plan (2.1.1) is established and project development begins.
Project/ Intervention2:	Facilitate the training of tour guides, with assistance from CATHSETA, for existing and suggested projects which require tour guiding (e.g. project 2.1.2, 2.1.4, 2.1.8, 2.1.9, 2.1.10, and 2.3.1). Work in conjunction with Amafa (2.1.4) and EKZNW (2.3.1- 2.3.3) where conservation skills are required.
Project/ Intervention3:	Facilitate skills development for the exhibition centre (2.2.3), in collaboration with Indonsa Arts and Crafts Centre skills training, and DAC.
Project/ Intervention4:	Facilitate and or ensure skills development and quality control of performance groups of performing artists in Ulundi public tourism attractions, e.g., musicals and shows at the LA building (2.1.3) and the Zulu dancing at Prince Mangosuthu Buthelezi Airport (in conjunction with FedAir and ZDM) (project 2.1.7). Ensure this is executed through relevant departments and stakeholders (DAC, CATHSETA, Umthashana FET College, etc).
Project/ Intervention5:	Ensure that where projects involving overnight stays in communities are included, Hospitality Business skills Training is offered to entrepreneurs. Work in conjunction with existing training offered through DEDT and ZDM.

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3. SUMMARY OF STRATEGIES, GOALS AND PROJECTS

STRATEGIES		GOALS		PROJECT/ INTERVENTIONS	
1	MARKETING OF ULUNDI MUNICIPALITY TO ENSURE ATTRACTION OF NEW LEISURE MARKETS (MARKETING AND MARKET DEVELOPMENT)	1.1	Convert existing business tourists into business-leisure tourists	1.1.1	Ensure branding is market driven: Intentionally market Ulundi as a business and leisure destination, by including this in branding.
				1.1.2	Create packages between products and market with special offers to local tourists. Create marketing campaign specifically for business tourists, and encourage establishments to offer free leisure days for a set number of business days spent in Ulundi.
		1.2	Ensure Ulundi, in correspondence with other locations in Zululand (particularly Nongoma) is perceived by Zulu South Africans throughout the country as destination to discover Zulu history.	1.2.1	Market Ulundi in partnership with Nongoma Local Municipality at trade shows, and gateways into the province, as well as television shows such as Sho't Left in locations throughout South Africa with high Zulu populations of "New Horizon Families"; e.g. Gauteng, Durban and Pietermaritzburg.
				1.2.2	Sub brand Ulundi, in conjunction with Nongoma, as a destination for Zulu people to go on heritage/ "self"-finding holidays. Brand using phrases such as "Zazise Umlando Wakho", "Yazi Umlando Wakho"; "Zithole"; "Yazi Usiko Lwakho"; "Zazise Usiko Lwakho", etc.
		1.3	Increase international tourist visits to Ulundi	1.3.1	When R66 and traffic circle is fixed, assist CTO, in representing Amafa as the heritage custodian to contact tour bus companies to arrange visits to Ulundi's heritage sites. Ensure this occurs after the traffic circle into the UMgungundlovu Multimedia Centre is made accessible for busses.
				1.3.2	Liaise with TKZN (arrange meetings, contact and provide advertising material) for marketing of Ulundi Municipality as a destination, in conjunction with Nongoma Municipality, for international tourist to discover Zulu culture.
				1.3.3	Ensure that heritage sites are packaged. Assist CTO in linking and packaging products together (along with products external to Ulundi Municipality) such that a day's experience is offered.
		1.4	Leverage off Prince Mangosuthu Buthelezi Airport as marketing drawcard	1.4.1	Ensure Prince Mangosuthu Buthelezi Airport, including new routes, and entertainment component are included in marketing material.
				1.4.2	Search tourism websites; national and international, and request that Prince Mangosuthu Buthelezi Airport be recorded as transport facility, in addition to King Shaka and Richard's Bay Airports (as well as others in the Province).
		1.5	Resuscitate Sports Tourism Markets in Ulundi	1.5.1	Seek agreements and contracts with key sports teams throughout the province for games to be hosted in Ulundi.
				1.5.2	With upgrade of Stadium, market Ulundi as a destination for sports teams in the province (specifically soccer), and offer packages with accommodation and tourism attractions.
2	TO INCREASE AVAILABLE TOURISM OFFERINGS IN ULUNDI MUNICIPALITY (PRODUCT DEVELOPMENT)	2.1	Provide innovative tourism products according to key opportunities in Ulundi Municipality	2.1.1	Explore river rafting, and other water sports opportunities along Black and White Umfolozi Rivers.
				2.1.2	Develop township tour route.
				2.1.3	Facilitate use of a venue in Ulundi Municipality as a theatre facility for Zulu theatre (musicals, performances, dancing, etc.).
				2.1.4	Organize the Battle of Ondini Commemoration as (one of the) signature heritage events of Ulundi Municipality. Do in collaboration with British and Zulu Royal Households. Incorporate other important battles, such as the battle of KwaNhlophenkulu, KwaCeza and KwaNdunu (in collaboration with Nongoma Municipality)
				2.1.5	In conjunction with Zululand DM, assist with development of Prince Mangosuthu Buthelezi Airport into an entertainment hub.
				2.1.6	Development of Cengeni Gate into a full service tourist gate.
				2.1.7	In conjunction with FedAir as the Prince Mangosuthu Buthelezi Airport flights operator, organise regular Zulu dancing at Prince Mangosuthu Buthelezi Airport, which will correspond with leisure flight routes and schedules.
				2.1.8	In conjunction with FedAir as the Prince Mangosuthu Buthelezi Airport flights operator, facilitate the availability of tours within Ulundi, which will correspond with leisure flight arrivals; based on routes and schedules.
				2.1.9	Facilitate development of walking trails through overnight stays in townships, as well as activities along the trails (particularly for international visitors).
				2.1.10	Develop of hiking trails and homestay accommodation in KwaCeza, at KwaCeza caves, with community based arts and crafts facilities.
				2.1.11	Facilitate the development of a caravan and camping park in the Municipality.
		2.2	Encourage the availability of activities after average working hours, for visiting professionals	2.2.1	Explore the possibility of night drives at conservation areas throughout the Municipality.
				2.2.2	Facilitate and assist with (in conjunction with Zululand DM and FedAir) low key entertainment at Prince Mangosuthu Buthelezi Airport after hours (e.g. screenings, low key events, dinners, etc.). Strongly explore the possibility of including a cinema facility at the Airport.
				2.2.3	Development of an arts and crafts exhibition centre, with coffee shop, poetry and arts exhibitions in evenings. Also ensure the

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STRATEGIES			GOALS			PROJECT/ INTERVENTIONS	
							display of arts and crafts from Ulundi artists.
						2.3.1	Liaise with EKZNW to develop plan of support by Ulundi Municipality and Ulundi CTO for Matshitsholo Community Conservation Area.
			2.3	Provide assistance to EKZNW in infrastructure development, prioritisation of services, and marketing, for the development of Ulundi's conservation areas into niche tourism attractions.		2.3.2	Liaise with EKZNW to develop plan of support by Ulundi Municipality and Ulundi CTO for Mcakwini Community Conservation Area.
						2.3.3	Liaise with Amafa and EKZNW to develop plan of support by Ulundi Municipality for the responsible tourism upgrade of Emakhosini-Ophathe Game Reserve, including problem of poaching as a matter of urgency
						2.3.4	Conduct public infrastructure and services audit of private conservation areas in the local municipality, and develop plan to provide support for them. Include marketing plan by Ulundi CTO. (This includes Geleijk Water Conservation Area, Matatane Conservation Area Leopard Rock Reserve, Eagle View Reserve, Babanango Private Nature Reserve and Mawana Game Reserve).
						2.3.5	Conduct niche tourism potential study, for nature reserves throughout Municipality (such as hunting, bird watching, species tracking, etc.), to assist in developing Ulundi attractions into niche attractions. This requires collaboration with EKZNW for an understanding of the unique environmental attributes of each conservation area.
			2.4	Developed tourism support products which are important to tourism functioning		2.4.1	Facilitate the establishment of a car hire facility
						2.4.2	Assist where necessary in the installation of banking facilities at Prince Mangosuthu Buthelezi Airport (as more flights are scheduled)
			2.5	Tourism activities available in the local municipality during Reed Dance season to increase attractiveness of the Reed Dance as a packaged destination		2.5.1	Interact directly with Royal Household for an understanding of concerns around activity during the Reed Dance period, and to discuss potential ideas around product offering in this time.
						2.5.2	Liaise with Nongoma Local Municipality to jointly table potential attractions and events; e.g. tours, parties, etc. for Reed Dance period. Incorporate into marketing of Ulundi Municipality.
			2.6	The resuscitation of Sports Tourism in Ulundi Municipality, through the Ulundi Regional Stadium		2.6.1	Upgrading of the Stadium, in collaboration with the Community Services Unit
						2.6.2	Through the Ulundi Municipality Community Services Unit, ensure regular priority funding is placed aside for regular maintenance of the Ulundi Regional Stadium, in order to ensure attractiveness of the stadium as a destination.
3	DEVELOPMENT OF TOURISM INFRASTRUCTURE IN THE MUNICIPALITY (INFRASTRUCTURE)		3.1	To see road infrastructure being prioritised in and surrounding the local municipality		3.1.1	Lobby KZN DOT for the repair of the R66, together with Zululand DM
						3.1.2	In collaboration with Nongoma LM, and EPWP (or similar programme), and in consultation with the KZN DOT develop intervention for regular filling of potholes with temporary material, until permanent repair of the R66 by KZNDOT. Facilitate community involvement by providing temporary employment to locals.
						3.1.3	In partnership with tourism product owners or official custodians (e.g. Amafa), facilitate and contribute to improvement of entrance roads into key tourism products such as uMgungundlovu Multi Media Centre and Battle of Ulundi Monument, where entrance roads are unsuitable for small cars, or are generally unkempt.
						3.1.4	Consult and Lobby with KZN DOT for the upgrade of the R68 into Babanango to encourage upgrade of Babanango Town (currently has potholes and requires lighting, and retarring in some locations).
			3.2	Develop key supporting infrastructure such as signage, information and tourist facilities in all key areas in the local municipality		3.2.1	Establishment of tourism information centre info centre in Ulundi Town opposite the Legislature Building, and a satellite office, both with an art and craft centre in partnership with the local community.
						3.2.2	Conduct comprehensive signage audit of Ulundi LM, seek funding and install signage throughout the Municipality.
						3.2.3	Erecting of street lights throughout key tourism nodes in the Municipality; mainly Ulundi Town and Babanango Town.
4	IMPROVE TOURIST RECEPTION IN THE MUNICIPALITY (HOSPITALITY)		4.1	Improve service delivery levels in Ulundi		4.1.1	Continue to provide service level training for tourism products, as well as non-tourism products throughout Municipality. Target key shopping centre outlets, and involve outsource training to specialist firm.
						4.1.2	Provide written complaint facility for tourists at key tourist centres; such as Ulundi Tourism Hub, which allow tourists to complain about service at specific establishments/ shopping facilities. Develop system where complaints are daily checked, and where Ulundi LM intervenes, or refers to the Consumer Rights Protection Unit at DEDT. Ensure that tourism products are aware of this system, and receive their input before implementation.
			4.2	Provide a clean Municipality which will attract tourists to use its services		4.2.1	Implement "Keep Ulundi Clean" campaign, including the provision of visible bins throughout the town, and signage (billboards, signage at bus stops, etc.), as well as litter pick up drives throughout the town, and general community awareness about the impact of littering on tourism in the town.
5	EFFECTIVISATION OF EXISTING		5.1	Encourage key decision makers to		5.1.1	Invite councillors and EXCO members for interactive tourist tour of Ulundi Municipality, informed by the economic benefits of

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STRATEGIES		GOALS		PROJECT/ INTERVENTIONS	
	INSTITUTIONAL STRUCTURES (INSTITUTIONS)		**perceive tourism as a vital and priority economic sector**		tourism. Stop at tourism attractions which have provided high levels of employment and GVA, and also highlight needs of tourism in the Municipality in general.
				5.1.2	Ensure that interactive tourism training is funded for and included in council induction process.
		5.2	**Encourage effective communication and harmony between key institutional tiers in Ulundi Tourism**	5.2.1	Meeting with Ulundi LM and Zululand District to understand roles of all key stakeholders, particularly around key infrastructure.
				5.2.2	Decide on procedures to be followed, together with Zululand DM, in developing tourism in Ulundi Municipality, such that if any stakeholder is to be interested in developing products in the municipality, a clear set of procedures is available.
				5.2.3	Facilitate more involvement with private sector through inviting them to participate at planning meetings, or by joining existing planning meetings held by Zululand DM
				5.2.4	Provide training for Ulundi Municipality employees on effective sourcing of funding.
				5.2.5	Resell CTO to private sector to encourage more sign ups. Aim for 80% of products registered with CTO. Explore possibility of availability of (potentially part time) employee of Ulundi CTO, available at tourism office, where product owners are able to interact and register directly with visible CTO, to assist with improvement of perceived efficiency.
6	**STRATEGY SIX: ENSURE RESPONSIBLE AND EFFECTIVE TOURISM DEVELOPMENT (CROSS CUTTING DEVELOPMENT PRINCIPLES)**	**6.1**	**Ensure community development is integral in tourism development**	6.1.1	Where projects are initiated by the Municipality, ensure project ownership is transferred to communities. Ensure that from the onset, projects are designed for community ownership, or ownership by community entrepreneurs.
		6.2	**Ensure tourism skills development is incorporated into tourism development**	6.2.1	Train guides for river rafting, and other water sports opportunities along Black and White Umfolozi Rivers, once project plan (2.1.1) is established and project development begins.
				6.2.2	Facilitate the training of tour guides, with assistance from CATHSETA, for existing and suggested projects which require tour guiding (e.g. project 2.1.2, 2.1.4, 2.1.8, 2.1.9, 2.1.10, and 2.3.1). Work in conjunction with Amafa (2.1.4) and EKZNW (2.3.1- 2.3.3) where conservation skills are required.

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4. CONCLUSION

There is much potential for Ulundi to be developed into a key heritage tourism destination, but this requires a significant number of strategic interventions as recommended in the table above. It is important that Ulundi pay attention to institutional requirements and issues in order to achieve this, and that there is collaboration with Nongoma Municipality, as well as other municipalities in the District; due to shared infrastructure, similar products, offerings, and experience theming. Should this strategy be efficiently implemented, Ulundi's economy will be significantly impacted.