



Tourism KwaZulu-Natal Statistics Report

Richard Wyllie

Wayne Tifflin

Tourism KwaZulu-Natal

December 2020

Statistics for the Tourism Sector (2019)

The World:
What is the size of the global foreign tourism market?

Global Foreign Tourism Market 2019

	World	Africa	South Africa	KZN
Size	1.5bn ¹	71 mn ¹	10.2 mn ³	±800 240 (±455 812*)
Growth (%)	4% ¹	4.2% ¹	-2.3% ³	-2.1% ³
Direct Spend (Tourism Receipts)	U\$8.9tr ²	U\$168bn ²	R81.2bn ³	R6.5bn ³
Daily Spend	-	-	R728 ³	R867 ³
Average Stay (nights)	-	-	11.4 nights ³	9.7nights ³ (Avg.)

[Source: UNWTO 2020 January Barometer¹, WTTC², SAT³ (*African Air and Land Arrivals 2019), (KZN = 6.7% of SA's total of 112.3mn bed nights in 2020)]

Global Tourism Contribution 2019

	World	Africa	South Africa	KZN
Number Directly Employed	122.2mn*	9.72mn*	±713 810*	±83 783***
Total Employed	330mn*	24.6mn*	±1 483 200*	±165 890***
Total Contribution to GDP %	10.3%*	±7.1%*	±7.0%*	±4,2%
Direct Contribution to GDP (Foreign + Domestic)	US\$2,306bn*	U\$61.3bn*	±R125bn**	±R14.4bn***
Total Contribution to GDP (Foreign + Domestic)	U\$8,9tr*	U\$168.5bn*	±R354.9bn* (U\$24.6bn)	±R28.8bn^

[Source: WTTC 2020*, SAT**, TKZN***, Stats SA**** derived from GDPR for KZN Current Prices - domestic and international+ STATSSA derived from GDPR for KZN Constant Prices, ^using multiplier of 2]

Tourism: Top 10 Global Destinations 2019 (million)		Tourism: Top 10 Global Spenders 2019 (US\$ billion)	
1. France	93.9	1. USA	195.1
2. Spain	83.1	2. China	131.3
3. United States	79.3	3. Spain	86.8
4. China	66.8	4. Thailand	68.9
5. Italy	63.1	5. France	65.4
6. Turkey	52.2	6. Germany	52.4
7. Mexico	44.2	7. Italy	50.1
8. Germany	39.8	8. Japan	47.1
9. Thailand	39.8	9. Turkey	41.4
10. United Kingdom	39.4	10. UAE	38.4
(South Africa = 10.2mn)			

[Source: UNWTO 2020]

[Source: WTTC 2020]

Top 10 Global Generators of Tourists 2019 (No. of Outbound Tourist Trips) (million)			
1. United States	129.5	6. Canada	38.7
2. Germany	113.2	7. Hong Kong, China	35.4
3. China	107.6	8. Italy	35.3
4. United Kingdom	89.6	9. Netherlands	34.2
5. France	52.7	10. South Korea	33.0

[Source: UNWTO 2020]

South Africa

The South African Foreign Picture 2019:

Number of foreign tourists: 10.2mn

Spend (pppd): R728 (R8 300 per trip)

Total Spend: R81.2bn

Average length of stay: 11.4 nights

Main overseas source markets: UK, USA, Germany, France, Netherlands

Spend Proportion: Foreign vs Domestic = 65% vs 35%

[Source: SAT 2020]

South Africa's Top 5 Overseas (Long Haul) Tourist Markets 2019:

1. UK	436 559
2. USA	373 694
3. Germany	322 720
4. France	165 038
5. Netherlands	144 071

[Source: SAT 2020]

South Africa's Top 10 average spending global markets per trip (excluding capital expenditure)

1. Democratic Republic of Congo	R29 400
2. Norway	R28 000
3. Middle East (excl. UAE)	R27 500
4. Switzerland	R26 800
5. Austria	R26 700
6. Netherlands	R25 900
7. United Kingdom	R24 200
8. USA / Germany	R22 900
9. Ireland	R22 400
10. Sweden	R22 200

[Source: SAT 2020]

Purpose of Visit to South Africa (All Foreign Tourists) 2019:

VFR	41.4%
Holiday	20.9%
Shopping Personal	13.5%
Shopping Business	9.4%
MICE	3.7%
Business Travel	2.7%

[Source: SAT 2020]

Age Groups (All Foreign Tourists) 2019:

18-24	14%
25-34	40%
35-44	23%
45-54	12%
55-64	7%
65-99	4%
<i>Refused to answer</i>	1%

Number of Visits to South Africa (All Foreign Tourists) 2019:

First Time	23%
2-3 Times	9%
4-5 Times	6%
6-9 Times	7%
10 or more	24%
Unsure	31%

South Africa's Annual Overseas (Long Haul) Visitor Arrivals (1980-2019):

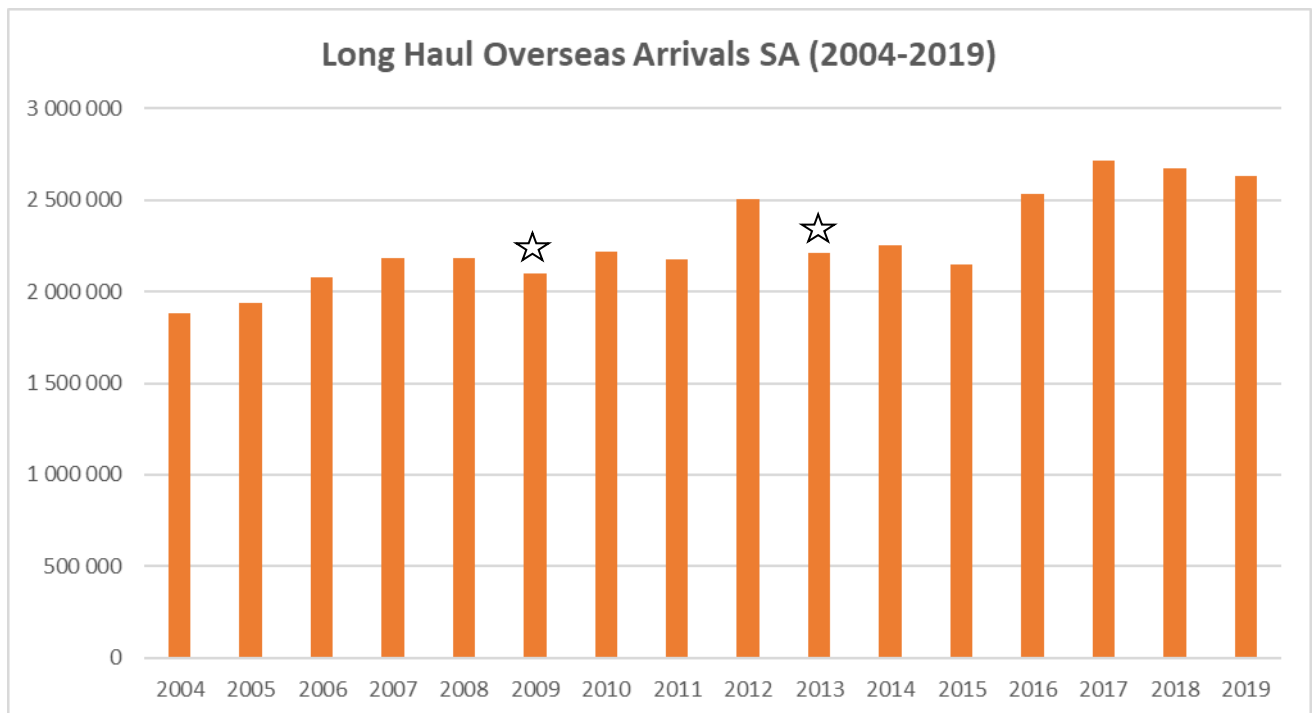
1980: 404 391
1981: 446 112
1982: 389 155
1983: 405 414
1984: 454 880
1985: 405 597
1986: 297 060
1987: 339 307
1988: 388 102
1989: 472 076
1990: 498 712
1991: 521 257
1992: 559 913
1993: 618 508
1994: 704 630
1995: 1 071 839
1996: 1 172 394
1997: 1 273 936
1998: 1 428 401
1999: 1 491 059
2000: 1 517 768

2001: 1 502 090
2002: 1 803 887
2003: 1 879 110
2004: 1 884 336
2005: 1 939 214
2006: 2 078 704
2007: 2 183 319
2008: 2 182 130
2009: 2 095 325#
2010: 2 216 994
2011: 2 176 179
2012: 2 505 762
2013: 2 213 134*
2014: 2 254 709*
2015: 2 144 988
2016: 2 531 046
2017: 2 713 133
2018: 2 672 146
2019: 2 627 750

[Source: SAT 2020]

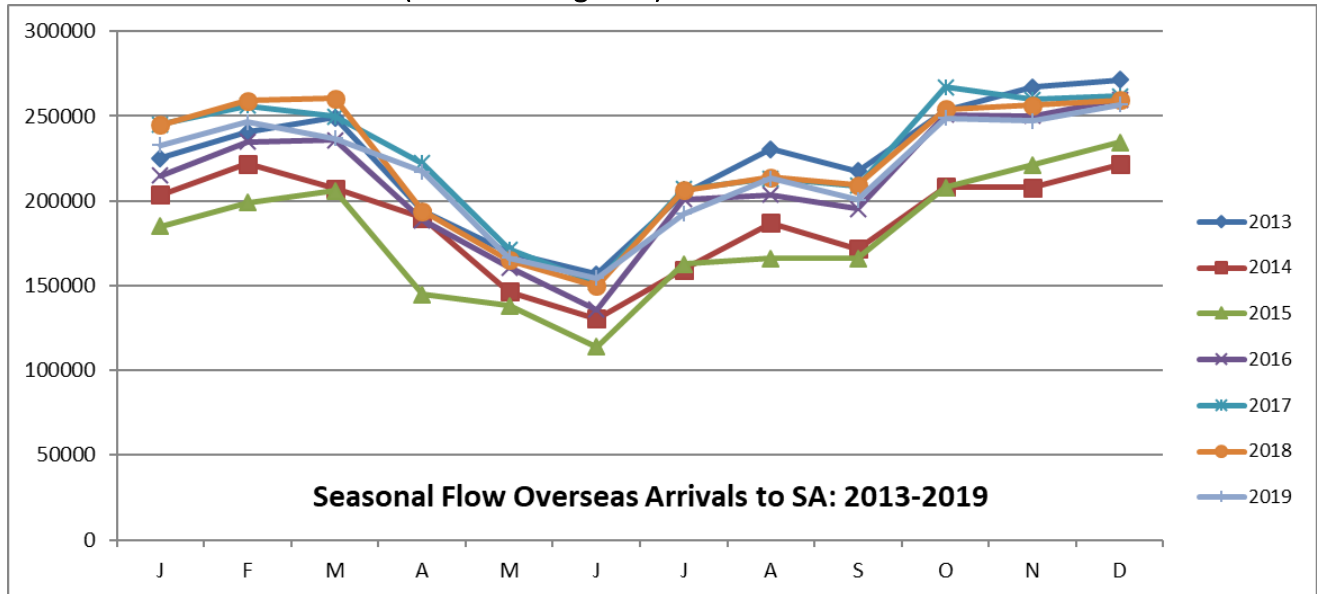
#Methodology change, day visitors now omitted from totals

*Methodology change, transits now omitted from totals



[Source: SAT 2019], *2009 Methodology Change (day visitors now omitted from totals) and 2013 Methodology Change (day visitors and transits now omitted from totals)

South Africa: Overseas Tourist (Inbound Long Haul) Seasonal Flow 2013-2019



The South African Domestic Tourism Picture 2019:

Numbers of tourists annually: 28.5mn trips / ±13.5mn travellers

Spend (per trip): ±R1 540 or ±R466 per day

Spend (total market value): R43.9bn direct spend

Average length of stay: 3.3 nights

Main source markets: Gauteng, KZN, W Cape, E Cape

[Source: SAT 2019]

Purpose of Trip (All Domestic Tourists) 2019:

VFR	52.7%
Holiday	24.8%
Religious	5.2%
MICE	2.2%
Medical	1.5%

[Source: SAT 2020]

Top 5 South African Domestic Tourism Source Markets 2019:

1. Gauteng	8.4 mn
2. KwaZulu-Natal	4.2 mn
3. Western Cape	3.5 mn
4. Eastern Cape	2.9 mn
5. Mpumalanga	2.4 mn

[Source: SAT 2019]

KwaZulu-Natal

KwaZulu-Natal - The Foreign Tourist Picture 2019:

Number of Visitors Annually: ±800 240

Average Spend per Visitor: ±R 7030 per trip, R725 per day

Spend (Total Market Value): R5.4bn

Length of Stay: 9.7 nights (Avg.)

Main Overseas Source Markets: UK, Germany, USA, France, Netherlands

[Source: SAT 2020]

KwaZulu-Natal's Top Ten Foreign Tourism Source Markets 2019

Source Country	Arrivals	Share (%)
1. Swaziland	299 118	39.6%
2. Botswana	42 762	7.0%
3. Lesotho	35 990	5.1%
4. UK	32 667	5.2%
5. Germany	26 768	5.5%
6. Zimbabwe	26 579	3.7%
7. USA	24 836	4.5%
8. France	16 973	3.3%
9. Zambia	14 610	2.0%
10. Netherlands	14 028	3.4%

[Source: SAT 2020]

KwaZulu-Natal's Top 6 Long Haul Source Markets (2014-2019)

2019	2018	2017	2016	2015	2014
1. UK	1. UK	1. UK	1. Germany	1. UK	1. Germany
2. Germany	2. Germany	2. Germany	2. UK	2. Germany	2. UK
3. USA	3. USA	3. USA	3. USA	3. USA	3. USA
4. France	4. France	4. France	4. Netherlands	4. France	4. France
5. Netherlands	5. Netherlands	5. Netherlands	5. France	5. Netherlands	5. India
6. Australia	6. Australia	6. India	6. India	6. India	6. Netherlands

[Source: SAT 2020]

Purpose of Visit to KZN (All Foreign Tourists) 2019:

VFR	46.6%
Holiday	32.1%
Shopping Business	4.3%
MICE	4.6%
Business Traveller	3.7%
Shopping Personal	3.1%
Religion	1.8%
Medical	0.4%
Other	6.5%

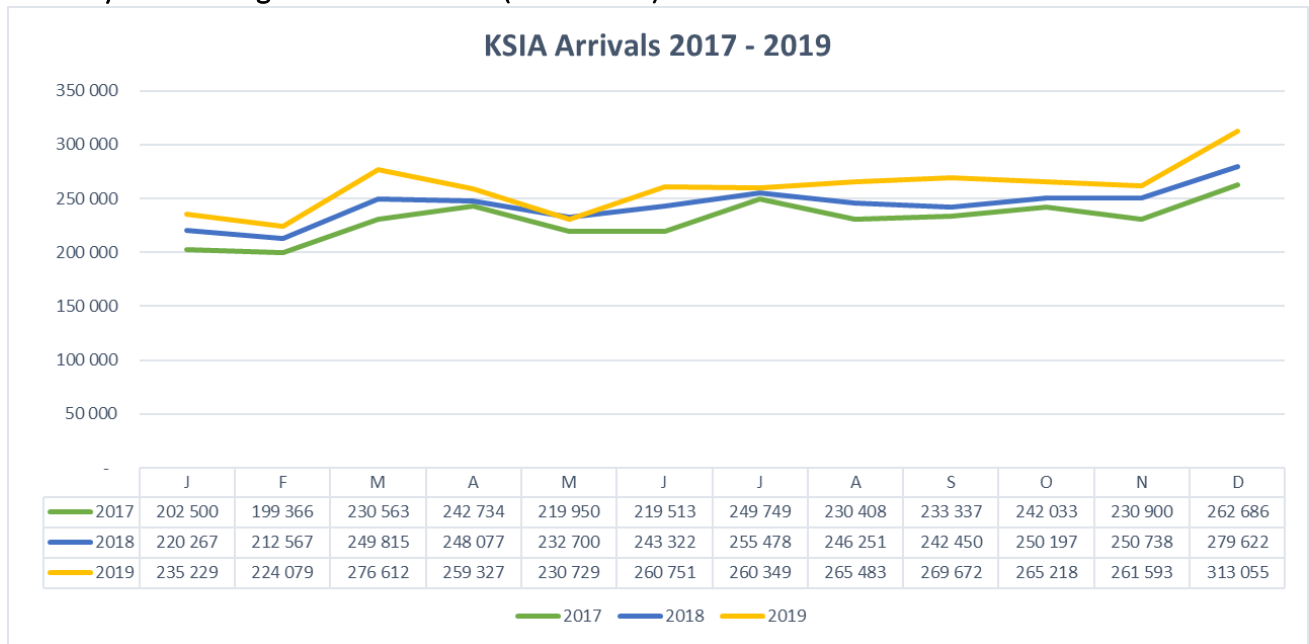
[Source: SAT/NDT 2020]

Destinations Visited in KZN (All Foreign Tourists) 2019:

Durban	64%
Pietermaritzburg & Midlands	9%
Zululand	13%
Drakensberg	1%
Elephant Coast	9%
North Coast	1%
South Coast	1%
Battlefields	3%

[Source: SAT/NDT 2020]

Monthly Air Passenger Arrivals to KZN (2017-2019)



KZN - The Domestic Tourist Picture 2019

Number of visitors annually: ±6.2mn trips

Average spend per trip: ±R1 298

Spend (Total Direct Value): ±R7.9bn

Average length of stay: 2.8 nights

Main source markets: KwaZulu-Natal, Gauteng, E Cape

[Source: SAT 2019]

KZN: Top 5 Domestic Source Markets and Trips 2019

Source Province	No. of Trips
1. KZN	3 707 305
2. Gauteng	1 588 296
3. Eastern Cape	653 635
4. Mpumalanga	82 405
5. Free State	62 651

[Source: SAT 2020]

KZN: Top Source Markets for Holiday Makers 2019

1. Gauteng

2. Western Cape
3. KwaZulu-Natal
4. Limpopo/North West
5. Mpumalanga/Eastern Cape

Source: SAT 2020

Purpose of Visit to KZN (All Domestic Visitors) 2019”

Purpose	No. of Trips (mn)
VFR	3.7
Holiday / Leisure	1.6
Religion	0.3
Medical	0.2
Business	0.1

[Source: SAT 2020]

Time of Visit (Months) 2019:

Month	% of Trips
January	3.2%
February	4.7%
March	6.4%
April	5.9%
May	3.8%
June	7.6%
July	5.0%
August	4.8%
September	13.0%
October	7.0%
November	12.8%
December	25.8%

[Source: TKZN 2019 (Omnibus Study 2020)]

Activities Undertaken in KZN (All Domestic Visitors) 2019:

Activity	%
Go to the beach	78.9
Watch a live sports event	38.9
Food and wine fair	37.4
Go to a live show, theatre or concert	37.0
Visit a museum, art gallery or historical building	36.6
Visit an township or cultural village on a tour	35.6
Visit a nature or wildlife or game reserve	33.2
Visit a health spa	27.9
Take part in a sports event	27.7
Visit an arts or craft outlet	24.5
Take part in any water sport	23.2
Go hiking or mountain climbing	21.4
Art and crafts festival	20.8
See bushman paintings	20.3
Attend a conference, workshop or training session	19.0
Bird watching (Avitourism)	18.7

Mountain biking or other cycling	18.6
Tour of the battlefields	18.0
Horse riding	16.7
Fly-fishing	15.1
Go backpack/hostel travelling	14.3
<i>Take part in another special activity</i>	<i>46.4</i>

[Source: TKZN 2019 (Omnibus Study 2020)]

Average Trips to Destinations in 2019:

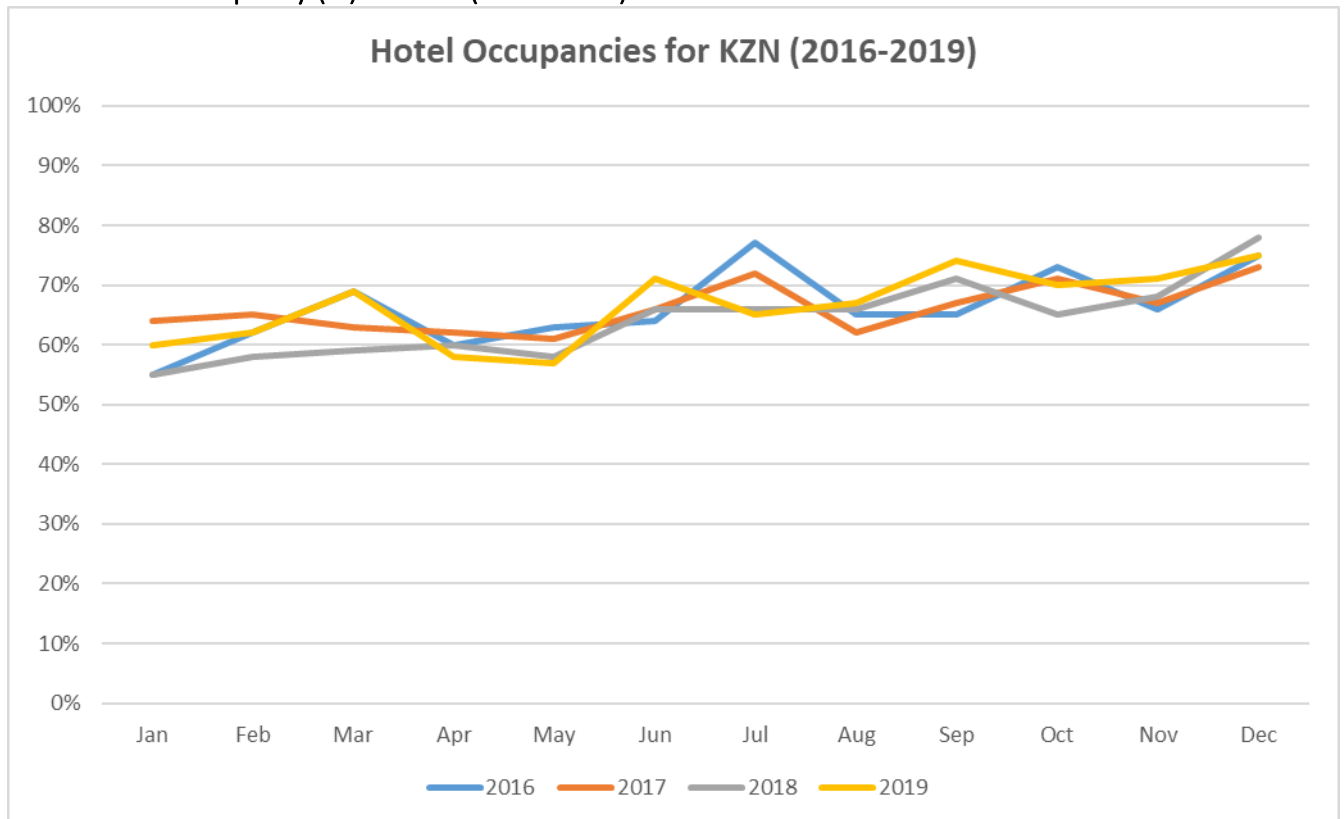
KZN – 1.31

Domestic Trips to Destinations in KZN 2019:

Destination	Share (%)	Est. No. of Trips
Durban	55%	3 410 000
Zululand	11%	682 000
South Coast	9%	558 000
PMB / Midlands	7%	434 000
North Coast	7%	434 000
Battlefields	6%	372 000
Drakensberg	3%	186 000
Elephant Coast	2%	124 000

[Source: TKZN 2019 (Omnibus Study 2020)]

Hotel Room Occupancy (%) for KZN (2016-2019)



Accommodation Types (All Domestic Visitors) 2019:

Accommodation	% share
Hotel	21.1%
B&B / Guest House/ Country House	20.7%
Guest Lodge	7.0%
Self-Catering	21.6%
Back-packers / Hostels	1.2%
Caravan and Camping	1.8%
Game Lodge	2.4%
AirBnB	1.4%
VFR*	22.7%

[Source: TKZN 2019 (Omnibus Study 2020)]

*VFR = Visiting Friends and Relatives

Number of Nights in KZN (All Domestic Visitors) 2019:

Number of Nights	% share
1 Night	8.4%
2 Nights	19.4%
3 Nights	26.2%
4 nights	12.5%
5 Nights	15.3%
6 Nights	3.5%
7 Nights	4.2%
8-14 Nights	6.6%
14+ Nights	3.9%

[Source: TKZN 2019 (Omnibus Study 2020)]

KwaZulu-Natal Supply Statistics 2019

Supply Category	No.
Hotels	233
Guest Houses	338
Lodges	204
Bed and Breakfasts	608
Caravan and Camping Sites	86
Self-Catering	709
Youth Hostels/Backpackers	38
Conference Venues	315
Tourist Guides	1 445

[Source: TKZN July 2020]

KZN's International and Domestic Segmentation 2014-2019

Market	Geographic Scope				Target Segments	Core Experiences
Domestic	<ul style="list-style-type: none"> • KZN • Gauteng • Western Cape • Eastern Cape • Free State 				<ul style="list-style-type: none"> • New Horizon families • High-life enthusiasts • Well-to-do Mzansi families • Spontaneous budget explorers • Seasoned leisure seekers 	<ul style="list-style-type: none"> • Beaches • Natural beauty • Nightlife • Shopping • Heritage • Culture
SADC Rest of Africa	<ul style="list-style-type: none"> • Swaziland • Lesotho • Botswana • Mozambique • Zambia • Zimbabwe 	<ul style="list-style-type: none"> * Kenya * Nigeria * Angola 			<ul style="list-style-type: none"> • Business professionals • Traders 	<ul style="list-style-type: none"> • Shopping • Big cities • Beaches (not coastal markets) • Wildlife • Heritage
Europe Americas Asia	<u>Core</u>	<u>Opportunity</u>	<u>Investments</u>	<u>Strategic Hub</u>		
	<ul style="list-style-type: none"> • United Kingdom • USA • Germany 	<ul style="list-style-type: none"> • France • Netherlands • Australia 	<ul style="list-style-type: none"> • India • China • Brazil • Sweden • Eastern Europe (Russia) 	Middle East (GCC countries)	<ul style="list-style-type: none"> • NSSA, Wanderlusts • Family explorers • New beach lovers 	<ul style="list-style-type: none"> • Natural beauty • Wildlife • Culture • Visiting mountains • Beach • Adventure (USA Wanderluster)

[Source: TKZN 2017]

KZN Provincial Information

Area	94 361 km ² (7.7% of South Africa)
Coastline	560kms
Climate	Sub-tropical. Summer 17-28 °C, Winter 11–25 °C, Durban average rainfall 1 009mm
Highest Elevation	3 451 m (Mafadi, in the Drakensberg)
Population	As of 2016 - 11.1mn (19.8% of South Africa) (growth rate 1.6%) Estimated population for 2020 – 11.5mn
Population Density	±100 people per square kilometer (km ²)
Capital	Pietermaritzburg
Languages	Mainly Zulu and English
Holidays	1 January, 21 March, 24 March, 27 April, 28 April, 1 May, 2 May, 16 June, 9 August, 24 September, 16 December, 25 December, 26 December.
Time Zone	GMT +2
Currency	The Rand made up of 100 cents
GDP Contribution	16% of South Africa's GDP* [second after Gauteng (34%)]
Electricity	220 Volts
Harbors	Durban, Richards Bay
Airports	King Shaka International Airport, Oribi, Richards Bay, Margate, Ulundi.
Literacy Rate	80.2% (2016)
Employment rate*	Between 59.3% - 76.1% (2016, using strict and expanded definitions)

[Source: TKZN, IHS, STATSSA, KZN Provincial Treasury*, Quantec**]



iSimangaliso Wetland Park, a World Heritage Site	
Location	North eastern coast of KwaZulu-Natal, South Africa
Date of Inscription	December 1999
Criteria	Unique ecological processes, superlative natural phenomena, biodiversity
Size	332 000 ha, 220 kms of coastline
Highest Elevation	Mt Tabor 130m on the Eastern Shores coast, Nyathikazi 159m on the northern coast, Maphelane sand dune 183m, oKhombe 474m and Lebombo Mountains 776m
Brief description	Three major lake systems, 8 interlinking ecosystems, 700 year old fishing traditions, Africa's largest estuarine system, 25 000 year old coastal dunes, 220km of coastline, coral reefs, salt and fresh water marshes, coastal grasslands, forested dunes, both tarred and gravel roads
Climate	Sub-tropical. Summer 17-28 °C, Winter 11 – 25 °C, average rainfall 650-800mm inland, 1200-1300mm on the coast.
Facilities	15 741 beds in and around iSimangaliso Wetland Park (this includes St Lucia, Western Shores, Eastern Shores, uMkhuze, Sodwana Bay, Kosi Bay and Hluhluwe/Mtubatuba) The types of accommodation facilities available in and around the Park: 11 hotels, 22 guesthouses, 39 B&Bs, 80 huts/chalets/lodges, 67 holiday flats/self-catering and 21 caravan/camping. Other tourist facilities include boat launch sites, picnic sites, bird and game viewing hides and boardwalks (including two aerial platforms).
Activities	Game drives (self-drive and guided), horse rides, fishing (includes deep sea charters), guided natural and cultural walks, turtle tours, whale watching, birdwatching, estuary boat cruises, scuba diving, snorkelling, kayaking.
Visitor Numbers	Annual total 2015: ±500 000
Animal Species / Numbers	Total species: over 6500 plant and animal species, of which there are 110 terrestrial mammals, 22 marine mammals, 128 reptiles and 50 amphibians Big 5: elephant, white and black rhino, buffalo, lion, leopard Other notable wildlife: 1700 crocodiles and 1600 hippos, giraffe, oribi, kudu, zebra, wildebeest, wild-dog, hyena, cheetah Insect species include: 282 butterfly, 38 dragonfly and damselfly, 52 fruit chafer beetle, 5 scorpions, and 228 spider species Notable marine species: leatherback turtles, loggerhead turtles, plus whales, dolphins, 129 corals, 991 ocean fish, 212 estuarine fish, 48 freshwater fish species, 812 marine molluscs and 20 sponges.
Bird Species / Numbers	525 bird species, including Fish eagle, Pelican, Rufous bellied heron, Saddle-billed stork, Flamingo, Crested guinea fowl, Southern banded snake-eagle, Mangrove kingfisher, Neergaard's sunbird, Livingstone's turaco, Lesser Jacana, Pink-throated twinspot, Rosy-throated longclaw
Other	2 185 vascular plants; 325 seaweeds

[Source: iSimangaliso 2017]

uKhahlamba Drakensberg Park World Heritage Site	
Location	Forms western KwaZulu-Natal border between S A and Lesotho, major watershed
Date of Inscription	November 2000
Criteria	Cultural (3) and natural (4) criteria
Size	242 813ha
Highest Elevation	3 451 m
Brief description	High basalt mountain range overlying sandstone bands over shale, foothills, incised valleys, grassland and protea, yellowwood and bottlebrush forests.
Climate	Summer 22 °C, winter 5 °C, average rainfall 900mm, frequently snow in winter
Facilities	700 beds inside the park, 2 000 closely adjacent, 9 campsites, ±150 caves, picnic sites, view sites, vultures' 'restaurant'
Activities	Walking, hiking, climbing, ice climbing, bird watching, fly fishing, paragliding, mountain biking, hand gliding, horse riding, horse trekking, river swimming, rock art viewing, picnicking
Visitor Numbers	Annual total 2015: ±105 578
Animal Species / Numbers	Mammals: 48 species including eland, water buck, oribi, mountain reed buck, ±1800 rhebok, jackals, leopard. Insects include 46 species of millipedes and centipedes, 44 dragonfly species (about a third of South Africa's total) and 74 butterfly species, 124 frog species 23 lizard and 25 snake species.
Bird Species / Numbers	Total: 296 species, including Lammergeyer, Cape vulture, black eagles
Other	2 153 plant species

[Source: TKZN 2017]