An aerial photograph of a surfer riding a wave. The water is a vibrant turquoise color, and the wave is breaking into white foam. The surfer is positioned in the lower right quadrant of the frame, riding the face of the wave. The overall scene is dynamic and captures the energy of surfing.

OMNIBUS STUDY (2019)

TOURISM KWAZULU-NATAL

4 & 5 March 2021

DISCLAIMER

- The data presented here is based on a survey (which was conducted during February 2020 (during the early stages of the COVID-19 pandemic) and it reflects the current situation.
- This data has been summarised for the purpose of this presentation. The full report is available upon request.
- The 2021 Omnibus Study is currently underway, whereby data for the 2020 omnibus study will be collected. This report will be updated in September 2021.

Introduction

- Tourism KwaZulu-Natal (TKZN) has conducted a survey about domestic tourism since 2015, as part of an omnibus study, which consists of 1000 respondents from urban areas nationally.
- The data was weighted using the 2015 Census of South Africa's community survey population.
- The objective of the study is to observe the behavior of **domestic** tourists in KwaZulu-Natal (KZN). South Africa's Statistics South Africa provide statistics and information on tourism.
- However, that information is limited in scope and nature, cannot provide all the insights needed, and is useful at a provincial level, or even

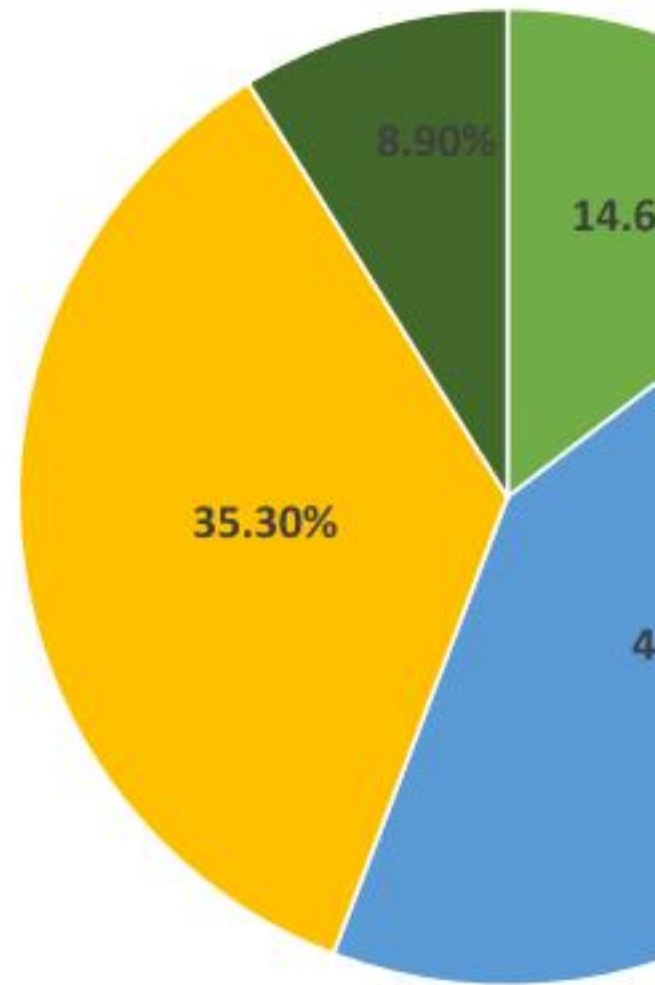
Introduction

The omnibus survey seeks to:

- Ascertain the brand health of the Zulu brand across different demographic patterns and provincial perceptions overall, according to the sample
- Ascertain the brand health of the Zulu brand across different demographic patterns and provincial perceptions of those who have travelled to KZN
- Ascertain recognition and associations with the Zulu brand
- Ascertain liking or intention to visit/visit again
- Ascertain perceptions of the position of the Zulu brand in the market and TKZN's brand
- And so on...

DEMOGRAPHICS

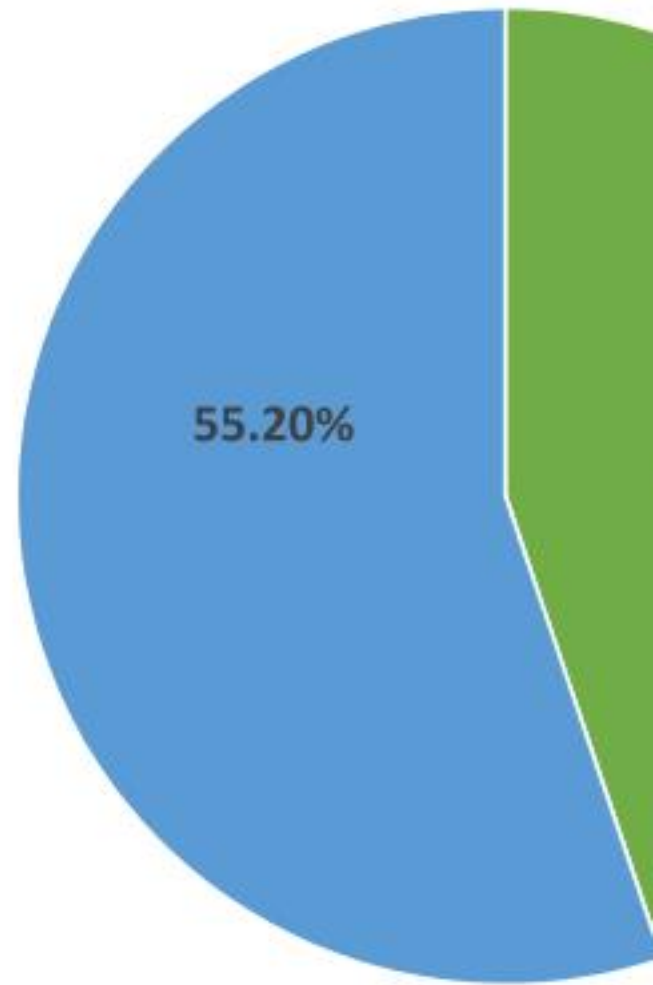
Age Groups



■ 18-24 ■ 25-34 ■ 35-44

DEMOGRAPHICS

Gender



■ Male ■ Female

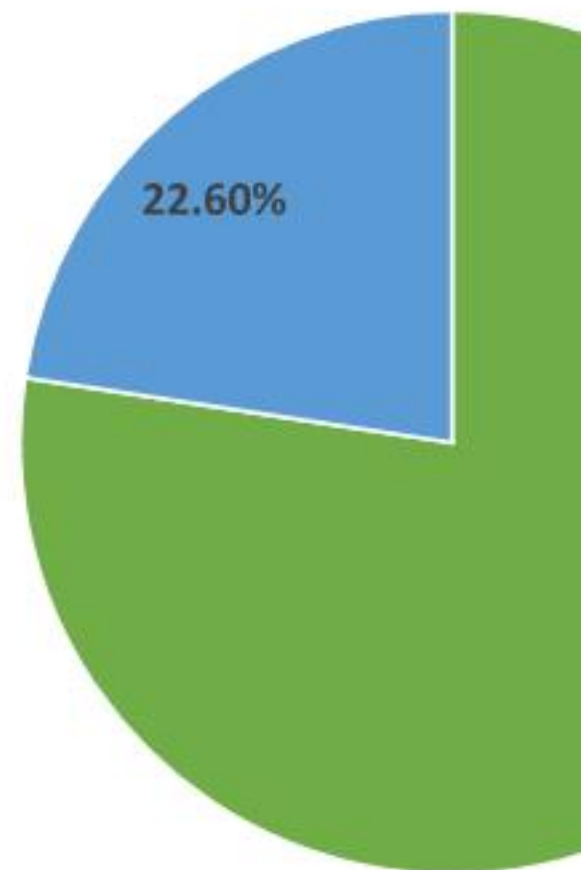
DEMOGRAPHICS

LSM Group (Income Level)



TRAVEL TRENDS

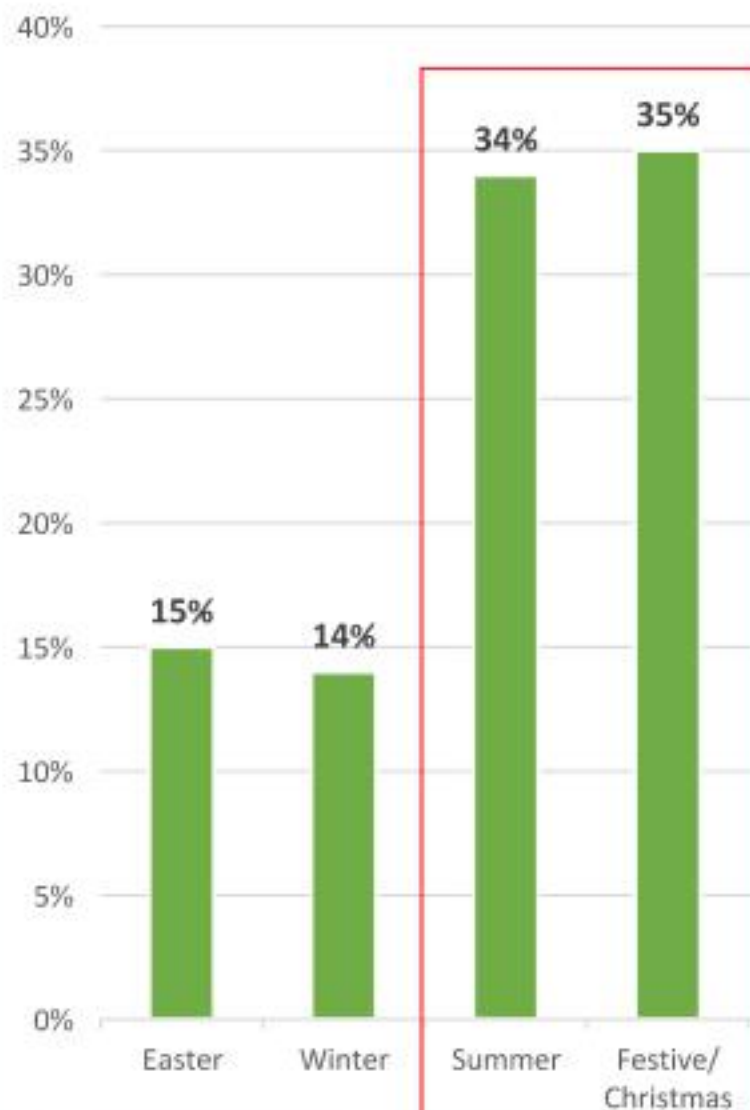
Overnight Stays



■ Yes ■ No

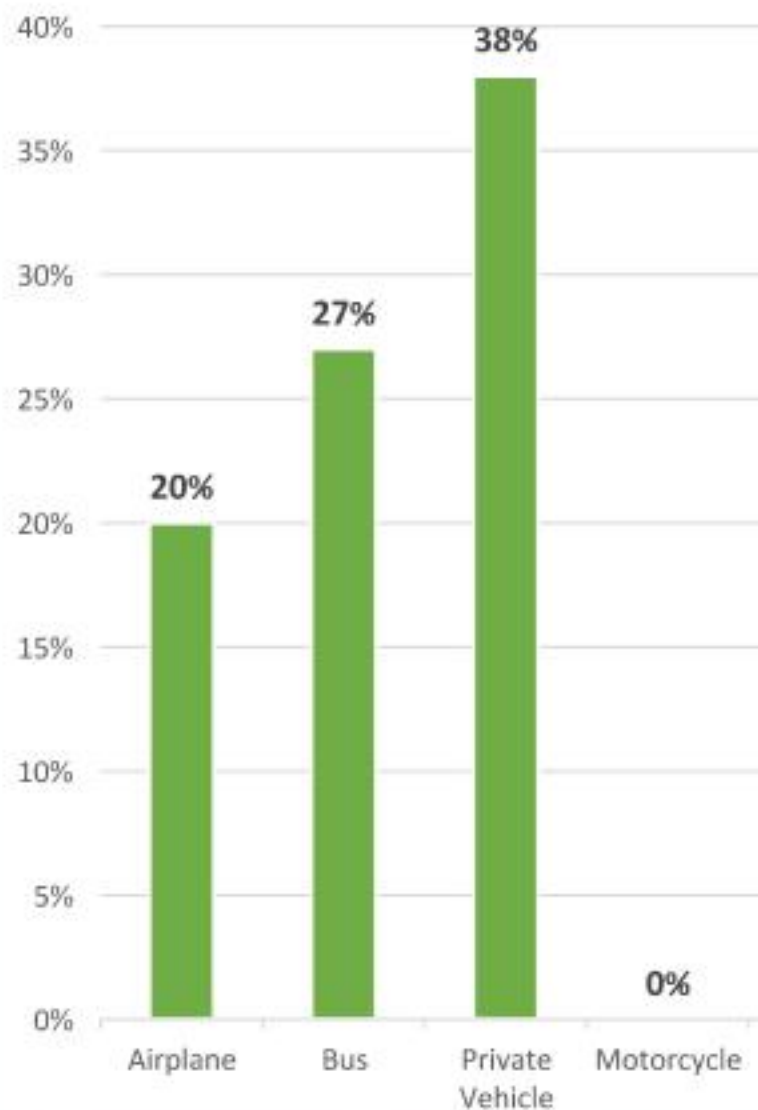
TRAVEL TRENDS

Seasonality



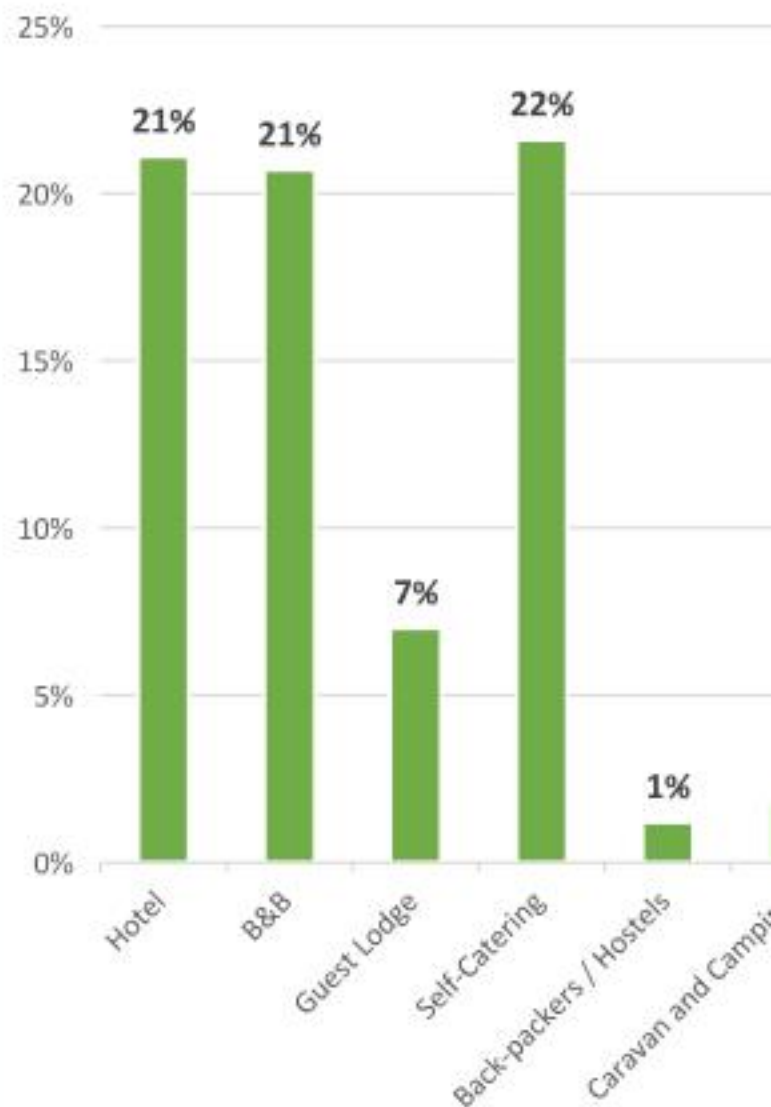
TRAVEL TRENDS

Transport



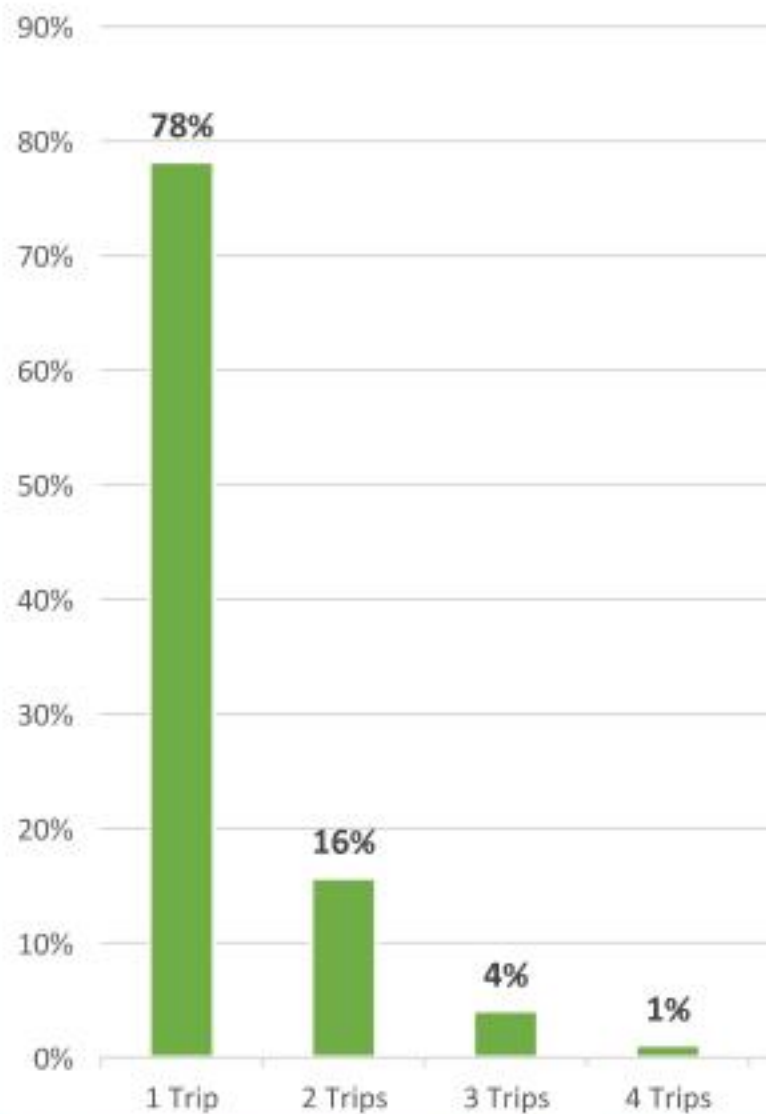
TRAVEL TRENDS

Accommodation



TRAVEL TRENDS

Number of trips



TRAVEL TRENDS

Destinations

KZN Regions
Durban
PMB / Midlands
Battlefields
Drakensberg
South Coast
North Coast
Zululand
Elephant Coast

TRAVEL TRENDS

Travel Month



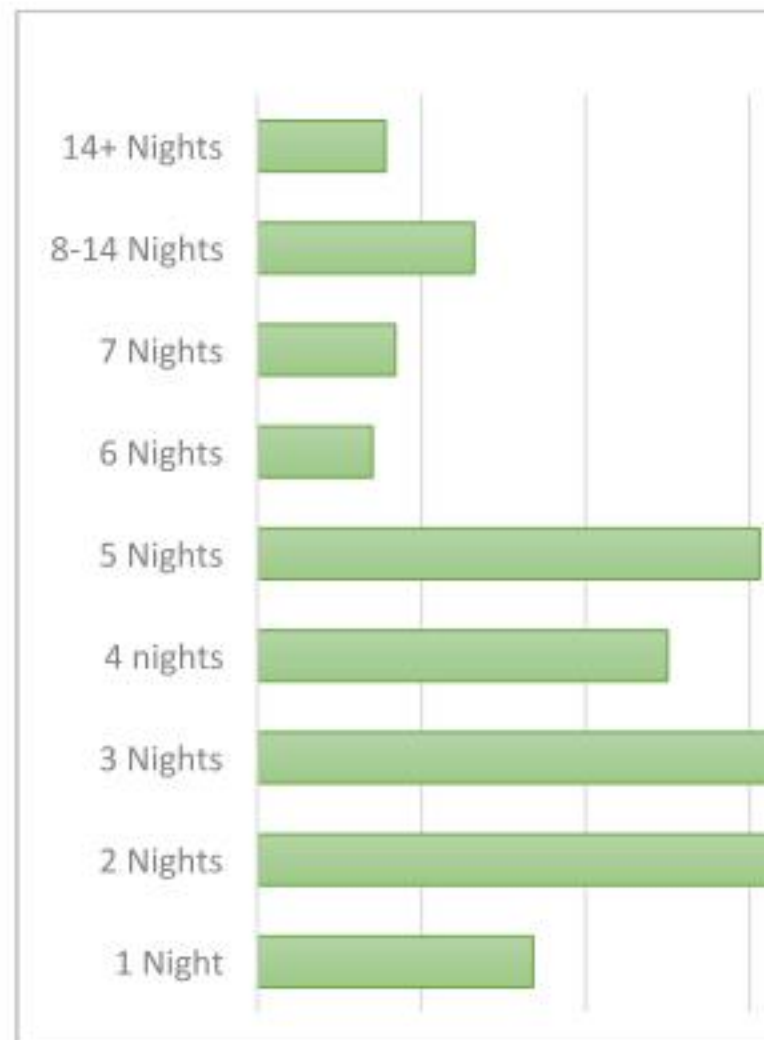
TRAVEL TRENDS

Purpose

Main Purpose
Holiday
VFR
Business
Entertainment / Event
Other

TRAVEL TRENDS

Length of Stay



TRAVEL TRENDS

Recommend KZN

TOP 5

1. Excellent beaches
2. Great weather
3. Friendly people
4. Entertainment
5. Shopping facilities

TRAVEL TRENDS

Top Activities



THANK YOU

