OMNIBUS STUDY REPORT (2019)

Richard Wyllie
Wayne Tifflin
Tourism KwaZulu-Natal
June 2020

INTRODUCTION

Tourism KwaZulu-Natal (TKZN) has conducted a nationwide survey about domestic tourism since 2006. The survey is part of an omnibus study, which consists of 2 500 respondents in urban areas nationally. The data was weighted using the 2016 Statistics South Africa's community survey population data.

The objective of the study is to obtain further insights into the behavior of domestic tourists travelling to and within KwaZulu-Natal (KZN). South Africa Tourism (SAT), does provide statistics and information on domestic tourism. However, that information is limited in that, due to its nature, cannot provide all the insights and information that is useful at a provincial level, or even municipal level.

The omnibus survey seeks to:

- Ascertain the brand health of the Zulu Kingdom brand, travel patterns and provincial perceptions by South Africans overall, according to the sample
- Ascertain the brand health of the Zulu Kingdom brand, travel patterns and provincial perceptions by South Africans who travelled to KZN
- Ascertain recognition and associations of TKZN's brand
- Ascertain liking or intention to visit/recommend
- Ascertain perceptions of the positioning statement used in TKZN's brand; and
- Test for general recognition of and perception about KZN as a domestic holiday destination; a conference or business breakaway; an entertainment or social event destination

In order to obtain this information a questionnaire (Appendix A) was developed. This questionnaire has been used for each survey, since the inception of the study, to ensure backwards compatibility.

A series of questions were asked of the respondents, first determining their awareness of KZN as a holiday destination, their motivation to travel to KZN, activities participated in, transport used to travel to KZN, amongst others. Questions were then asked of all respondents irrespective of whether they had travelled to KZN in 2019, followed further questions that were asked of those who did travel to KZN in 2019. The tables below provide comparative information of the KZN and Gauteng resident, KZN visitor and all the respondents. An explanation of each can be found below:

- KZN Resident – respondents who are resident in KZN, irrespective of whether they travelled or not.
- Gauteng Resident – respondents resident in Gauteng, irrespective of whether they travelled or not.
- KZN Visitor - all- all visitors to KZN in 2019, irrespective of province.
- All Respondents – respondents from all over SA, irrespective of whether they travelled to KZN in 2019 or not.

It is worth noting that KZN and Gauteng have been chosen because they are considered to be KZN's largest domestic tourism source markets.

1. DEMOGRAPHIC DATA (RESPONDENTS)

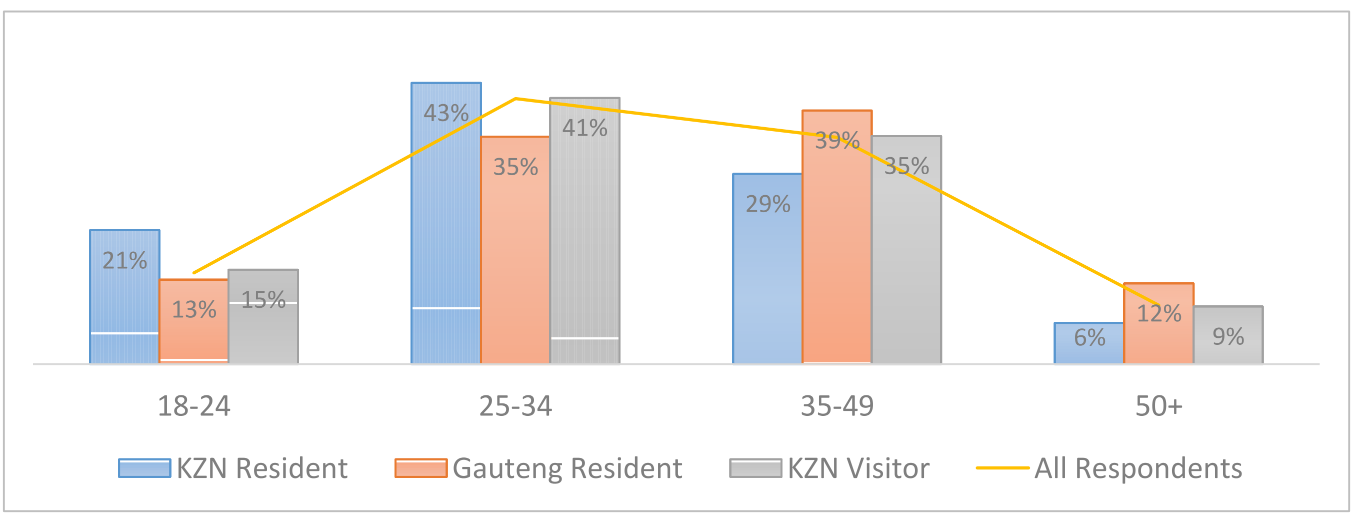
This section outlines the selected categories (e.g. age, gender, and so on) and the various provinces of origin of the respondents who were interviewed during this study. This data also shows that there are slight variations in each market. Therefore, these insights will assist TKZN in terms of how we 'talk' (market the destination) to these various market segments.

1.1. AGE GROUPS

The KZN resident respondent, was primarily between the age of 25-34, whereas the Gauteng resident was also between the ages of 25-49, with the majority being between 35-49 years of age. The visitors to KZN, and generally all of the respondents, were also in the 25-49 age group. As indicated the Gauteng and KZN residents are primarily in the 35-49 age group. This indicates a number of things:

1. They are most likely family groups
2. They receive a higher income per household

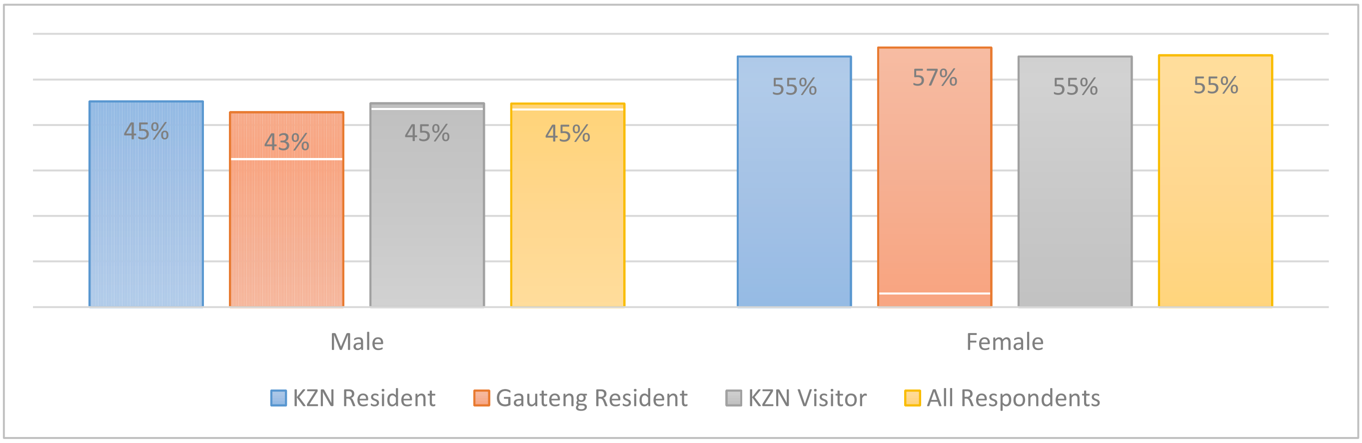
Therefore, TKZN's messaging/promotional activities needs to consider these differences.



Age Group	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
18-24	20.7%	13.1%	14.6%	14.7%
25-34	43.5%	35.2%	41.2%	41.1%
35-49	29.4%	39.3%	35.3%	35.1%
50+	6.4%	12.5%	8.9%	9.1%

1.2. GENDER

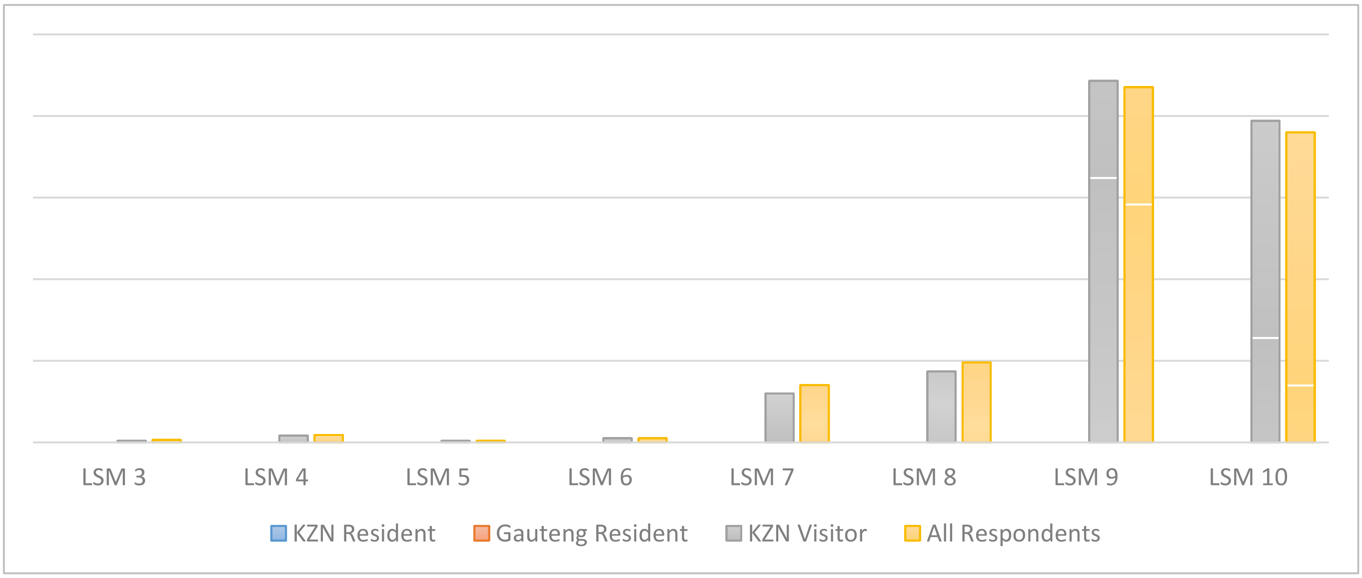
The data below has indicated that the majority of KZN residents and visitors to KZN are female. Once again, this influences the messaging that TKZN uses to market the destination. Gauteng has the highest proportion of female respondents followed by those who visited KZN in 2019 (with ‘all respondents’ excluded).



Gender	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Male	45.2%	42.8%	44.8%	44.7%
Female	54.8%	57.2%	55.2%	55.3%

1.3. LSM Group

The table below indicates the Living Standard Measure (LSM) of the respondents in this study. The LSM has become the most widely used marketing research tool in Southern Africa. It divides the population into 10 LSM groups, 10 (highest) to 1 (lowest). The LSM is a unique means of segmenting the South African market. It cuts across race and other outmoded techniques of categorizing people, and instead groups people according to their living standards using criteria such as degree of urbanization and ownership of cars and major appliances.

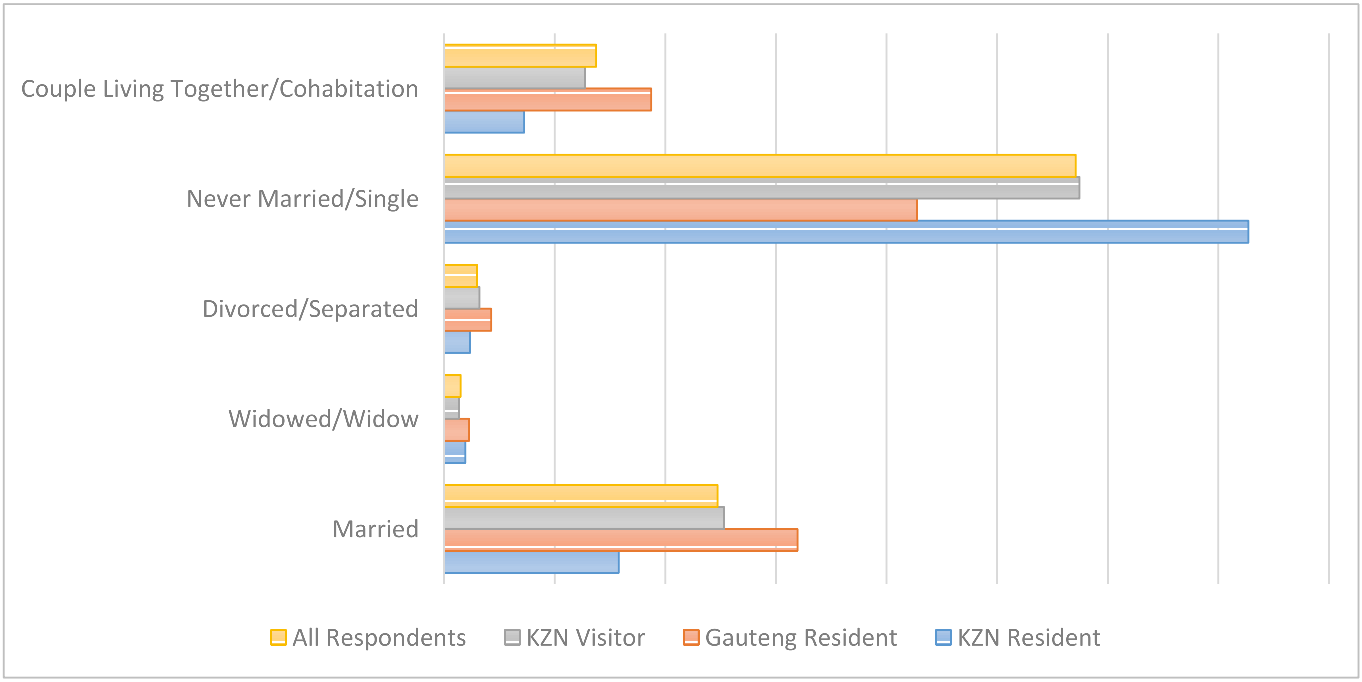


LSM Group	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
LSM 3			0.2%	0.3%
LSM 4			0.8%	0.9%
LSM 5			0.2%	0.2%
LSM 6			0.5%	0.5%
LSM 7			6.0%	7.0%
LSM 8			8.7%	9.8%
LSM 9			44.3%	43.5%
LSM 10			39.4%	38.0%

The majority of the respondents in each category were rated LSM 9 or 10 (on average, above 80%). This indicates that many respondents have the financial means to travel and may not make travel a priority, and they will most likely have disposable income for travel. **Additional information on LSM groups?**

1.2. MARITAL STATUS

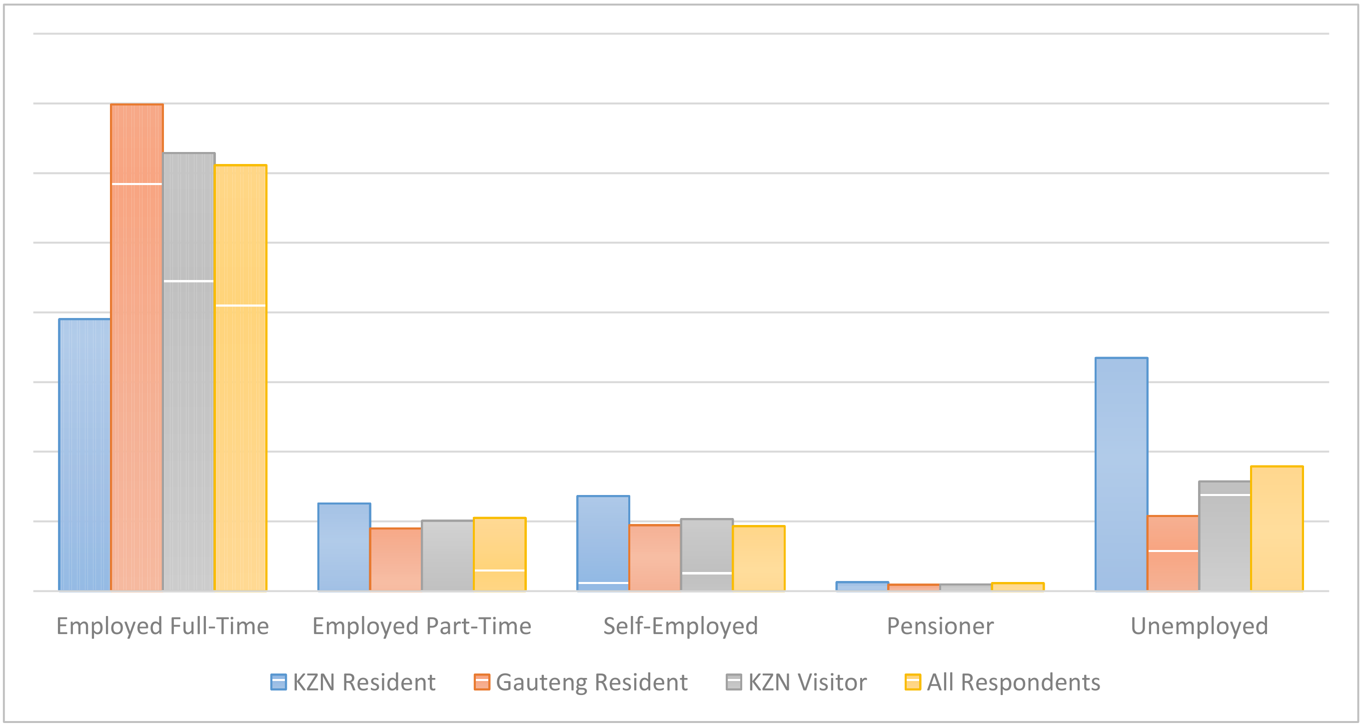
In terms of the marital status of the respondents, it is evident that majority (across all categories) are “Never Married” or “Single”. Following this, the 32% of the Gauteng Residents and 25% of KZN Visitors are “Married”. This data is important as it shows the type of “groups” that make up the important domestic source markets for KZN.



Marital Status	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Married	15.8%	32.0%	25.3%	24.7%
Widowed/Widow	1.9%	2.3%	1.3%	1.5%
Divorced/Separated	2.3%	4.3%	3.2%	3.0%
Never Married/Single	72.7%	42.8%	57.4%	57.1%
Couple Living Together/Cohabitation	7.2%	18.7%	12.8%	13.8%

1.2. EMPLOYMENT STATUS

It is evident that the majority of the respondents (across all categories) are employed on a "full-time" basis. This is a positive finding as it means they have a monthly income, of which, there may be some that can be used for travel. It was interesting to note the higher number of "unemployed" respondents who are KZN residents (34%). Further, 70% of Gauteng residents are employed "full-time", which is once again a positive finding. When looking at KZN Visitors alone, almost 83% of the respondents are employed in some form or another, which means they have an income to spend of travel into and within the province.



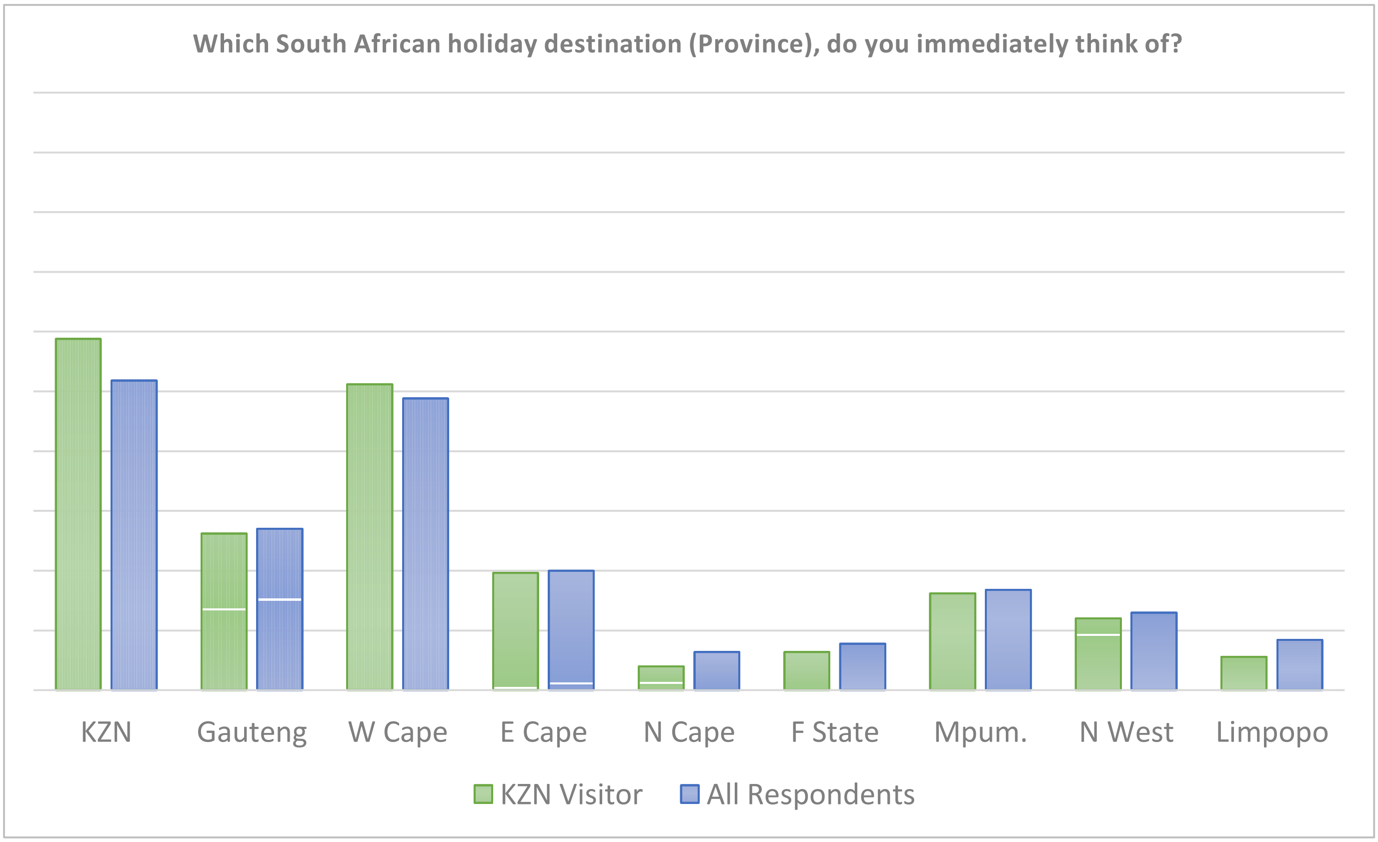
Employment Status	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Employed Full-Time	39.0%	69.9%	62.9%	61.1%
Employed Part-Time	12.6%	9.0%	10.1%	10.5%
Self-Employed	13.6%	9.4%	10.3%	9.3%
Pensioner	1.3%	0.9%	1.0%	1.1%
Unemployed	33.5%	10.8%	15.7%	17.9%

2. MARKET INSIGHTS

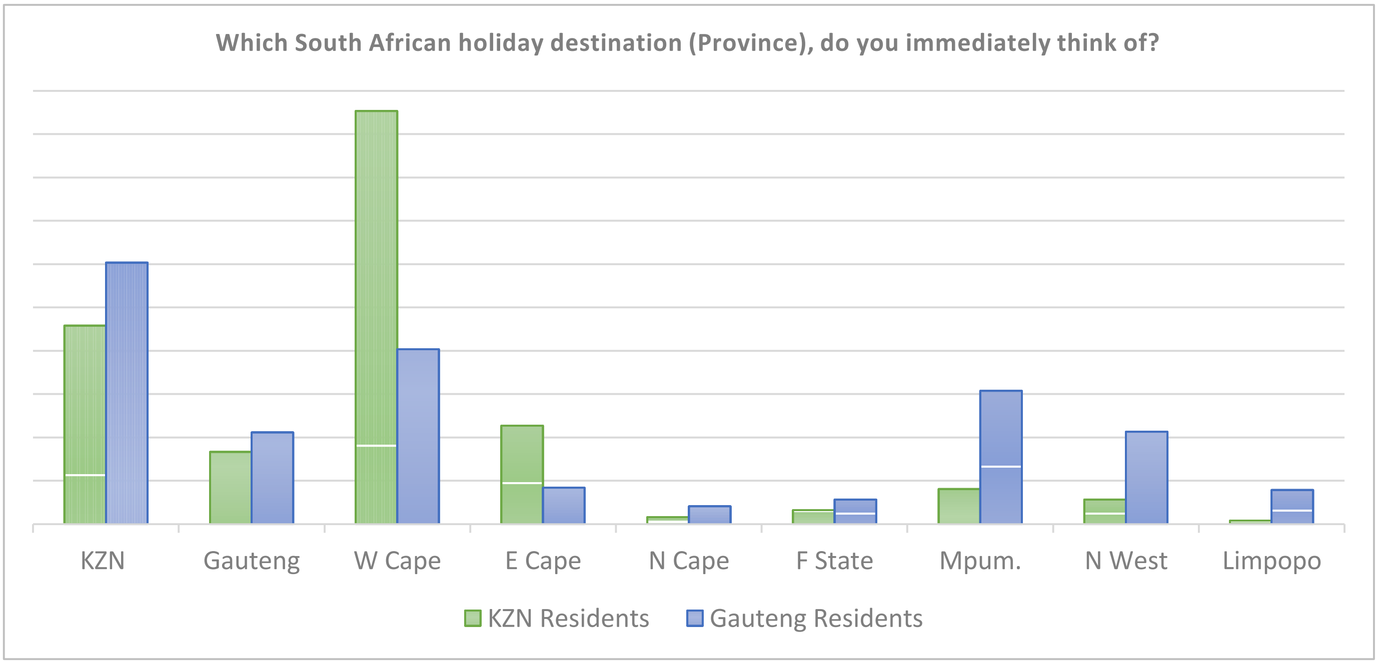
This section outlines the various insights into the source markets for domestic tourism into KZN. There are a number of insights and intelligence that have been gained from the various questions that were posed to the respondents. These insights are crucial for the marketing and promotional activities that TKZN wishes to undertake for the domestic source markets. It is also important to note that during early 2020, the COVID-19 pandemic has caused a ripple effect for global tourism. Furthermore, it has also caused a major disruption to all forms of tourism (international and domestic) in South Africa and KZN. It is therefore crucial to focus on the domestic markets to revive the destination for tourism activities.

2.1. SOUTH AFRICAN HOLIDAY DESTINATIONS

The respondents were asked about the holiday destination (province in South Africa) that they would immediately think of when planning to travel. It is evident that majority (inclusive of all respondents and those who visited KZN) immediately think of KZN and the Western Cape as viable **holiday** destinations. This is a positive finding for TKZN as it shows that KZN is considered as a "top of mind" destination for domestic tourists.



Furthermore, the data below shows that KZN residents are actually less likely to think of KZN (intra-provincial travel) as a holiday destination and the majority of the respondents have a preference to the Western Cape (just under 50%). It is therefore imperative to consider this when marketing the destination to domestic tourists, especially those within KZN. It is also important to note that 30% of Gauteng residents (respondents) consider KZN as their "top of mind" destination, however, they also consider the Western Cape (20%) and Mpumalanga (15%) as viable holiday destinations. It is therefore crucial to consider these trends when targeting the Gauteng market.

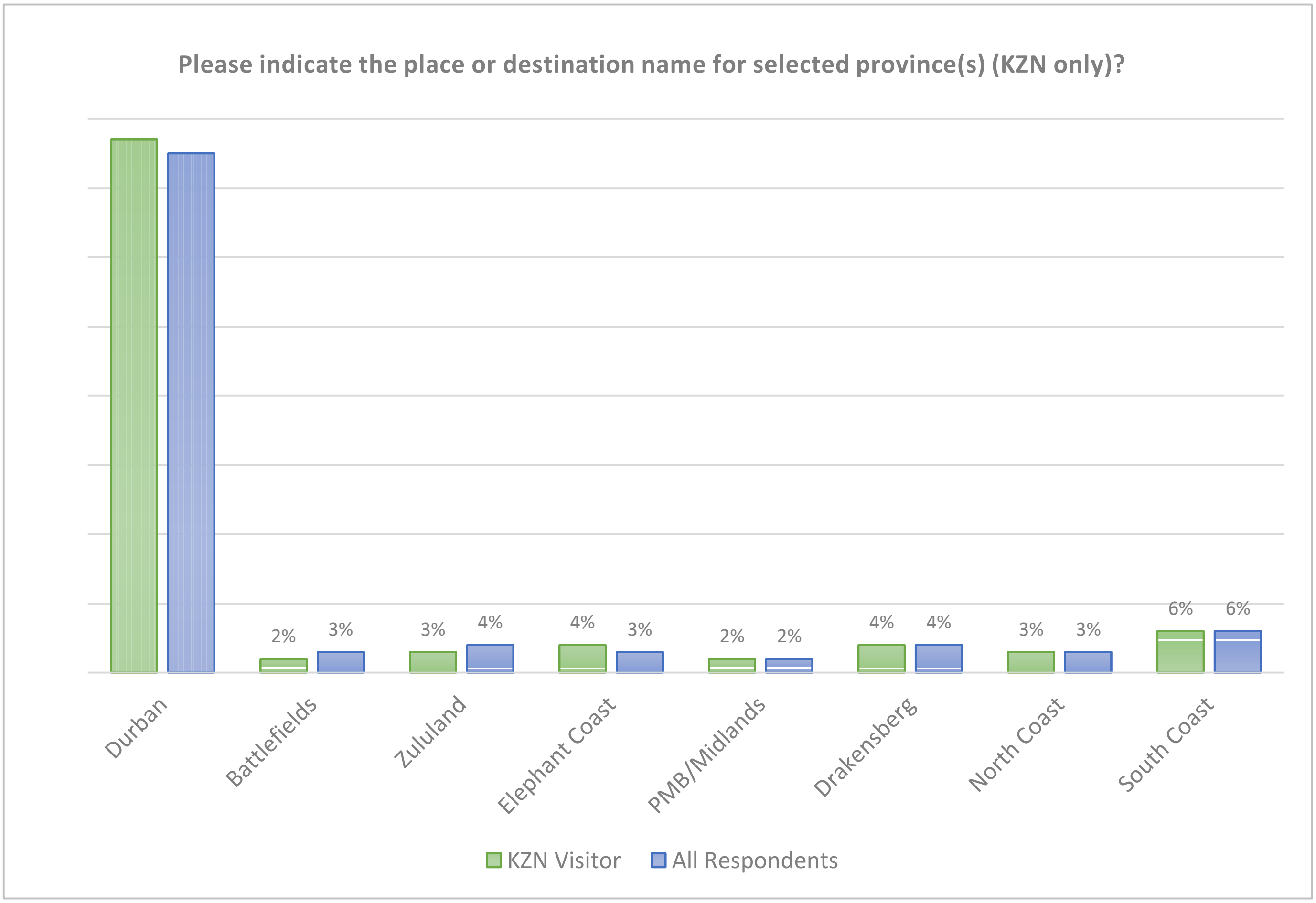


Destination Province	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
KwaZulu-Natal	22.9%	30.2%	29.4%	25.9%
Gauteng	8.3%	10.6%	13.1%	13.5%
W Cape	47.7%	20.2%	25.6%	24.4%
E Cape	11.4%	4.2%	9.8%	10.0%
N Cape	0.8%	2.1%	2.0%	3.2%
F State	1.6%	2.8%	3.2%	3.9%
Mpumalanga	4.1%	15.4%	8.1%	8.4%
N West	2.8%	10.7%	6.0%	6.5%
Limpopo	0.4%	4.0%	2.8%	4.2%

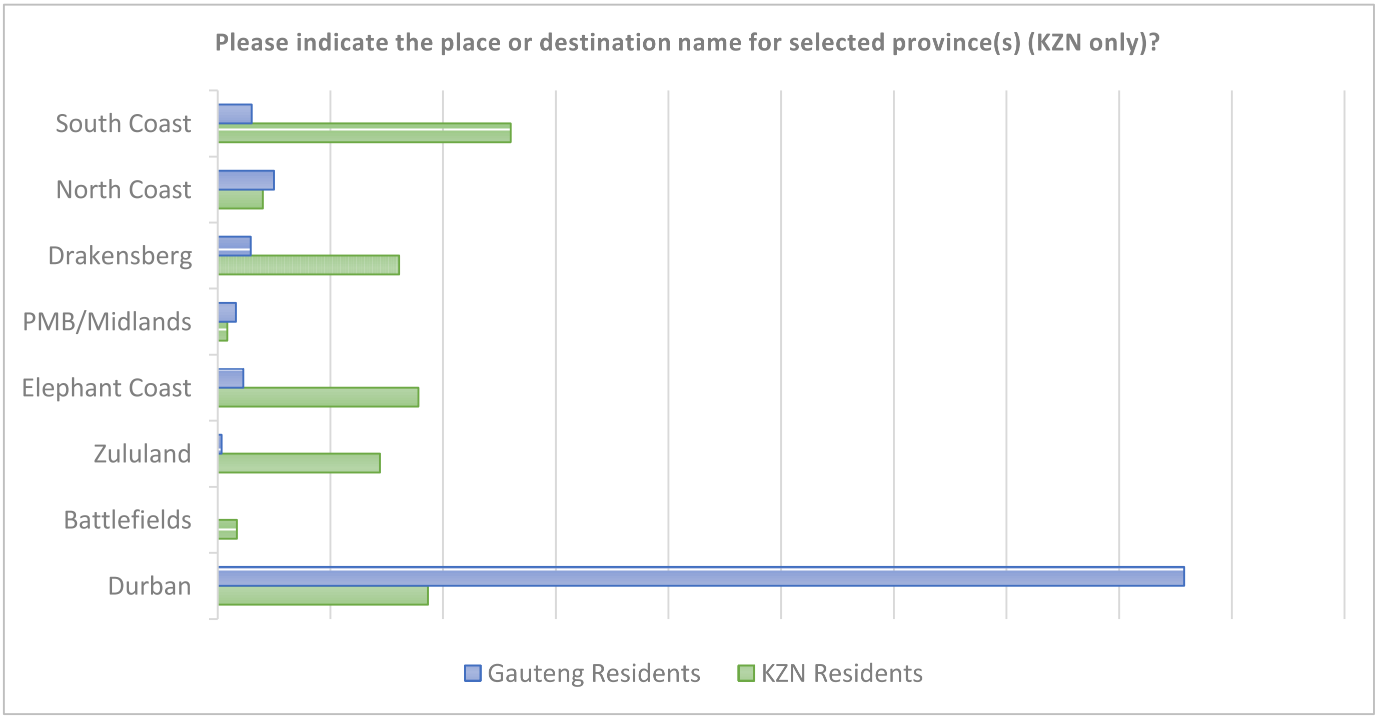
2.2. KZN HOLIDAY DESTINATIONS

2.2.1. "TOP OF MIND" DESTINATIONS

The respondents were asked about the holiday destinations (e.g. Durban, Winelands, Kruger National park), that they would immediately think of when planning to travel. This data was further analyses and excluded any destinations outside of KZN. Hence, the eight tourism regions in KZN have been analysed. It is evident that vast majority (inclusive of all respondents and those who visited KZN) immediately think of Durban as the "top of mind destination" in KZN (just under 80%). Following this, the South Coast and the Drakensberg are also considered to be popular. It may be worth looking at how some of the other regions (i.e. Battlefields and Pietermaritzburg/Midlands) can be marketed better in future.



Furthermore, the data below shows that KZN residents are most likely to think of the South Coast (26%) and Durban (19%) when visiting KZN. It is therefore imperative to consider this when marketing the destination to domestic tourists, especially those within KZN. It is also important to note that 86% of Gauteng residents (respondents) consider Durban as their "top of mind" destination, however, they also consider the North Coast (5%) and South Coast (3%) as viable destinations in KZN. It is therefore crucial to consider these trends when targeting the Gauteng market.



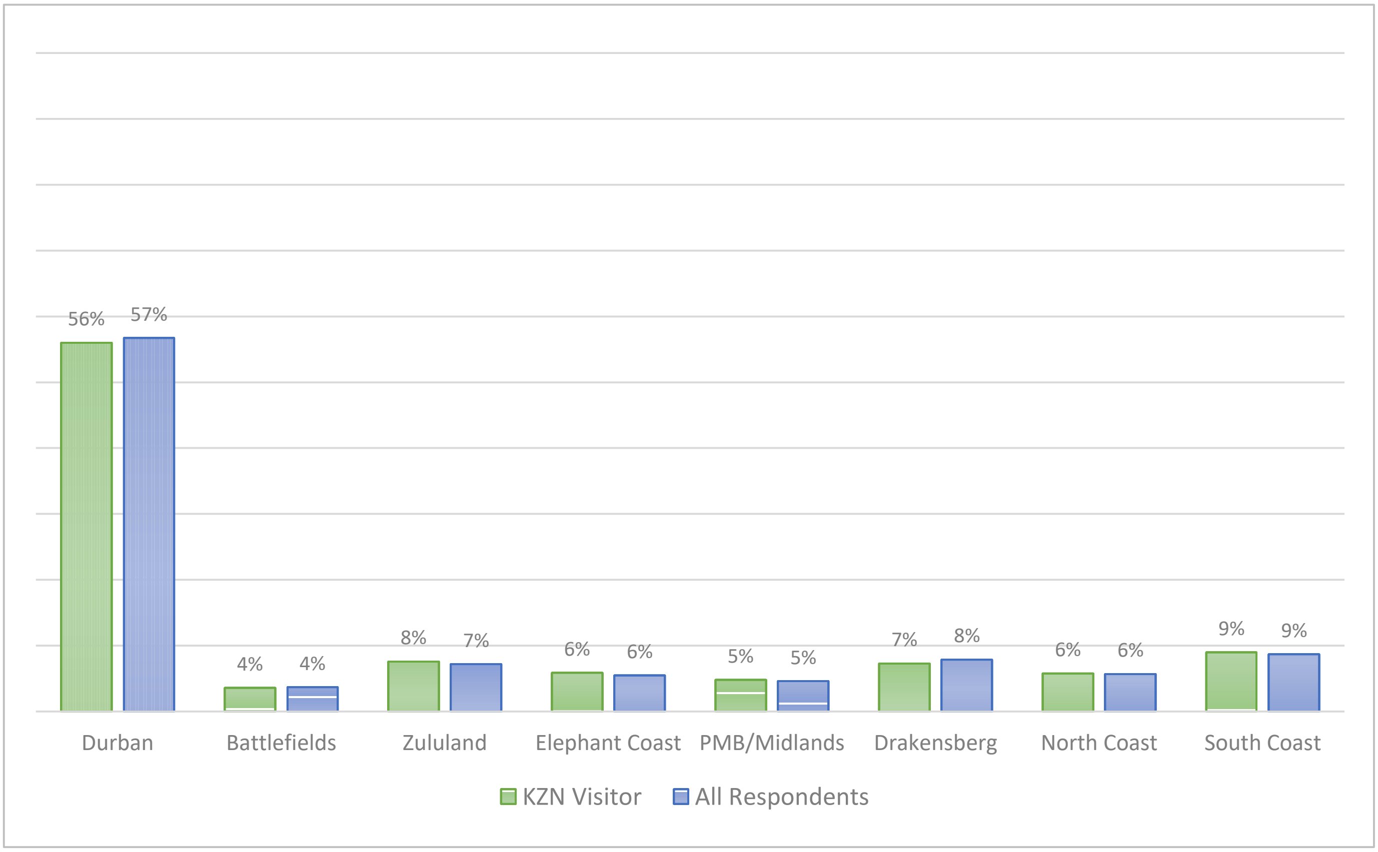
Destination	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Durban	18.6%	85.8%	76.6%	75.2%
Battlefields	1.7%	0.0%	1.9%	2.7%
Zululand	14.4%	0.3%	3.1%	3.9%
Elephant Coast	17.8%	2.3%	3.5%	3.3%
PMB/Midlands	0.8%	1.6%	1.8%	2.1%
Drakensberg	16.1%	2.9%	4.3%	4.4%
North Coast	4.2%	4.5%	3.0%	2.5%
South Coast	26.3%	2.6%	5.8%	6.1%

2.2. KZN HOLIDAY DESTINATIONS

2.2.2. CONSIDERATIONS TO VISIT KZN

The respondents were asked whether they were considering visiting KZN. The data has revealed that (when considering all respondents) **88%** said 'Yes' and **12%** said 'No'. This is a favourable finding as vast majority have indicated their intentions to travel to and within KZN. Furthermore, **92%** of KZN residents said that they do plan to travel within their home province, whilst **91%** of Gauteng residents indicated their intention to visit to KZN.

Based on these findings, the additional data below shows which regions of KZN that are considering to visit FIRST when traveling to KZN. It is evident that the majority of respondents (inclusive of all respondents and those who had visited KZN) will consider visiting Durban (56% & 57%), the South Coast (9%), Zululand (8% & 7%) and the Drakensberg (7% & 8%) first. There are some slight variances with these findings , however, the most popular destinations remain to be Durban, the South Coast, and Drakensberg.

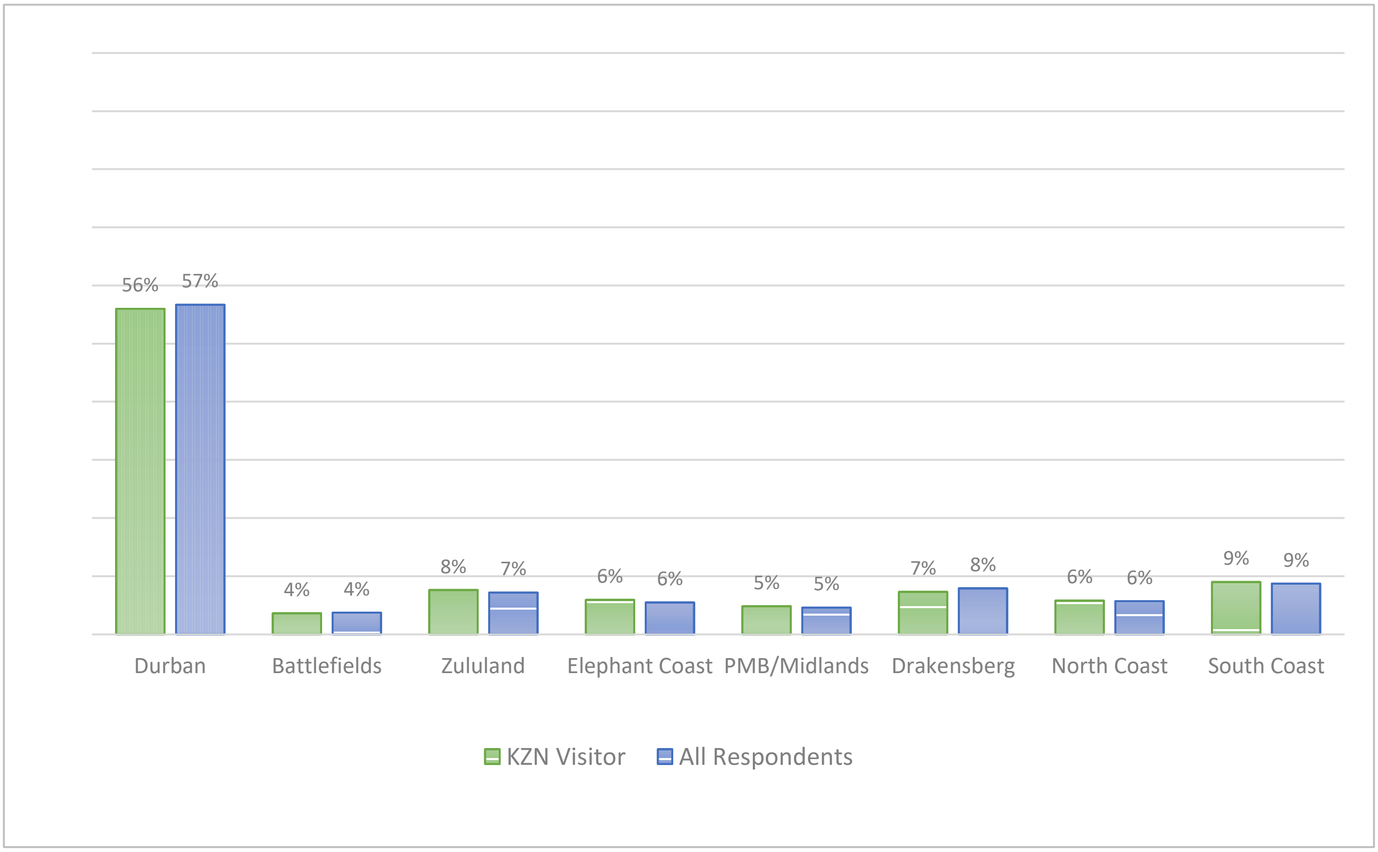


2.2. KZN HOLIDAY DESTINATIONS

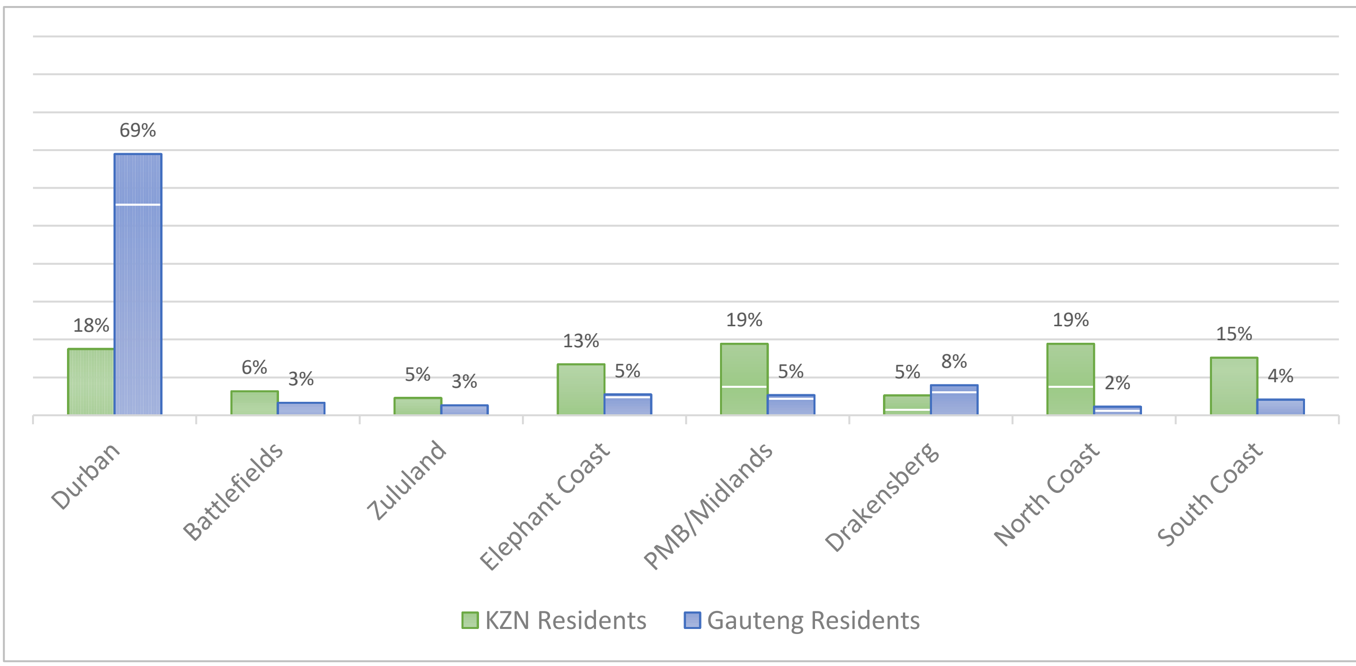
2.2.2. CONSIDERATIONS TO VISIT KZN

The respondents were asked whether they were considering visiting KZN. The data has revealed that (when considering all respondents) **88%** said 'Yes' and **12%** said 'No'. This is a favourable finding as vast majority have indicated their intentions to travel to and within KZN. Furthermore, **92%** of KZN residents said that they do plan to travel within their home province, whilst **91%** of Gauteng residents indicated their intention to visit to KZN.

Based on these findings, the additional data below shows which regions of KZN respondents are considering to visit FIRST when traveling to KZN. It is evident that the majority of respondents (inclusive of all respondents and those who had visited KZN) will consider visiting Durban (56% & 57%), the South Coast (9%), Zululand (8% & 7%) and the Drakensberg (7% & 8%) first. There are some slight variances with these findings , however, the most popular destinations remain to be Durban, the South Coast, and Drakensberg.



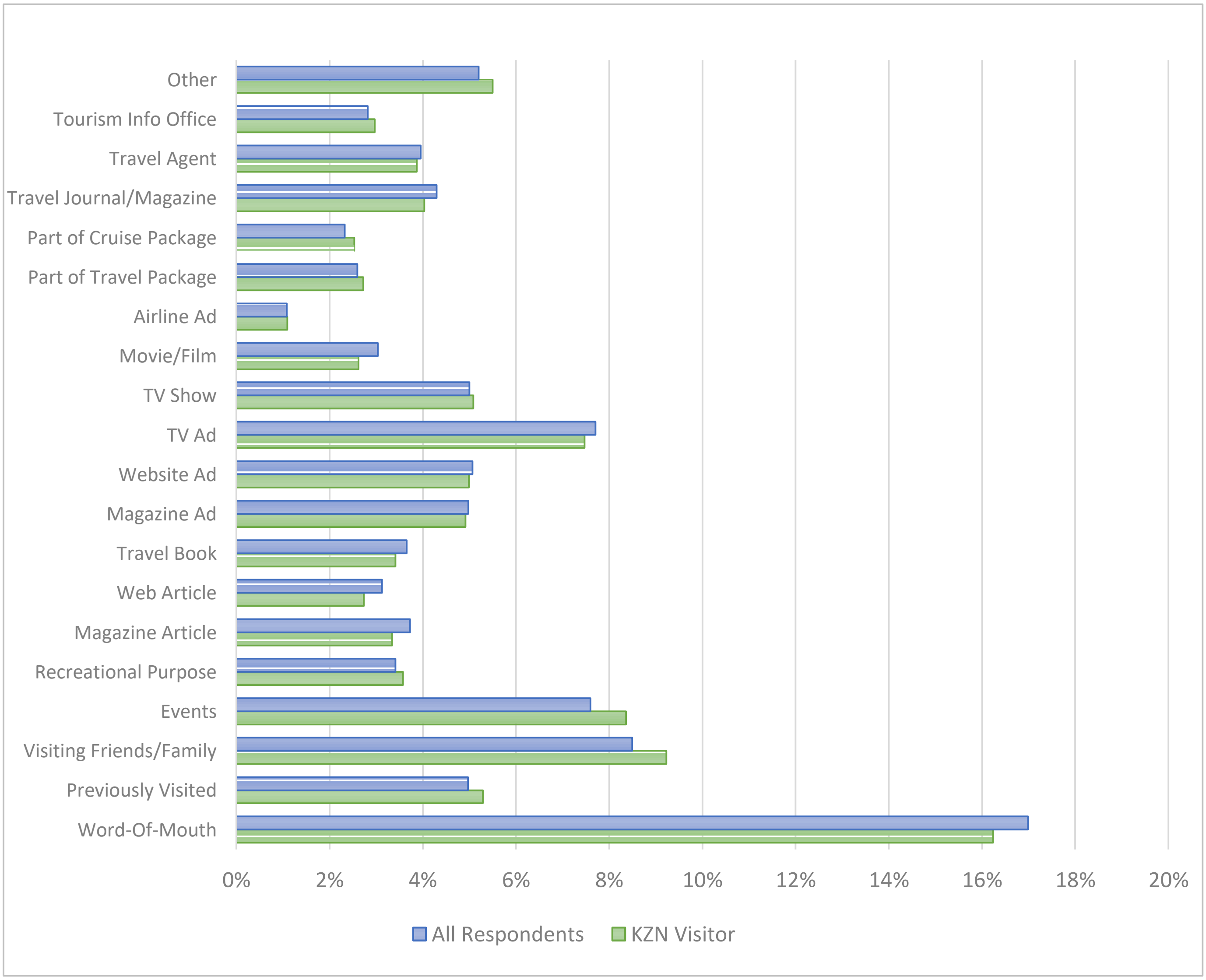
Furthermore, the data below shows that KZN residents are most likely to visit the North Coast and Pietermaritzburg/Midlands (both 19%), Durban (18%), and the South Coast (15%) first when traveling to KZN. It is therefore imperative to consider this when marketing the destination to domestic tourists, especially those within KZN. It is also important to note that 69% of Gauteng residents (respondents) consider Durban as their destination of choice in KZN, however, they also consider the Drakensberg (8%) and the Elephant Coast and Pietermaritzburg/Midlands (both 5%) as viable destinations in KZN. It is therefore crucial to consider these trends when targeting the Gauteng market.



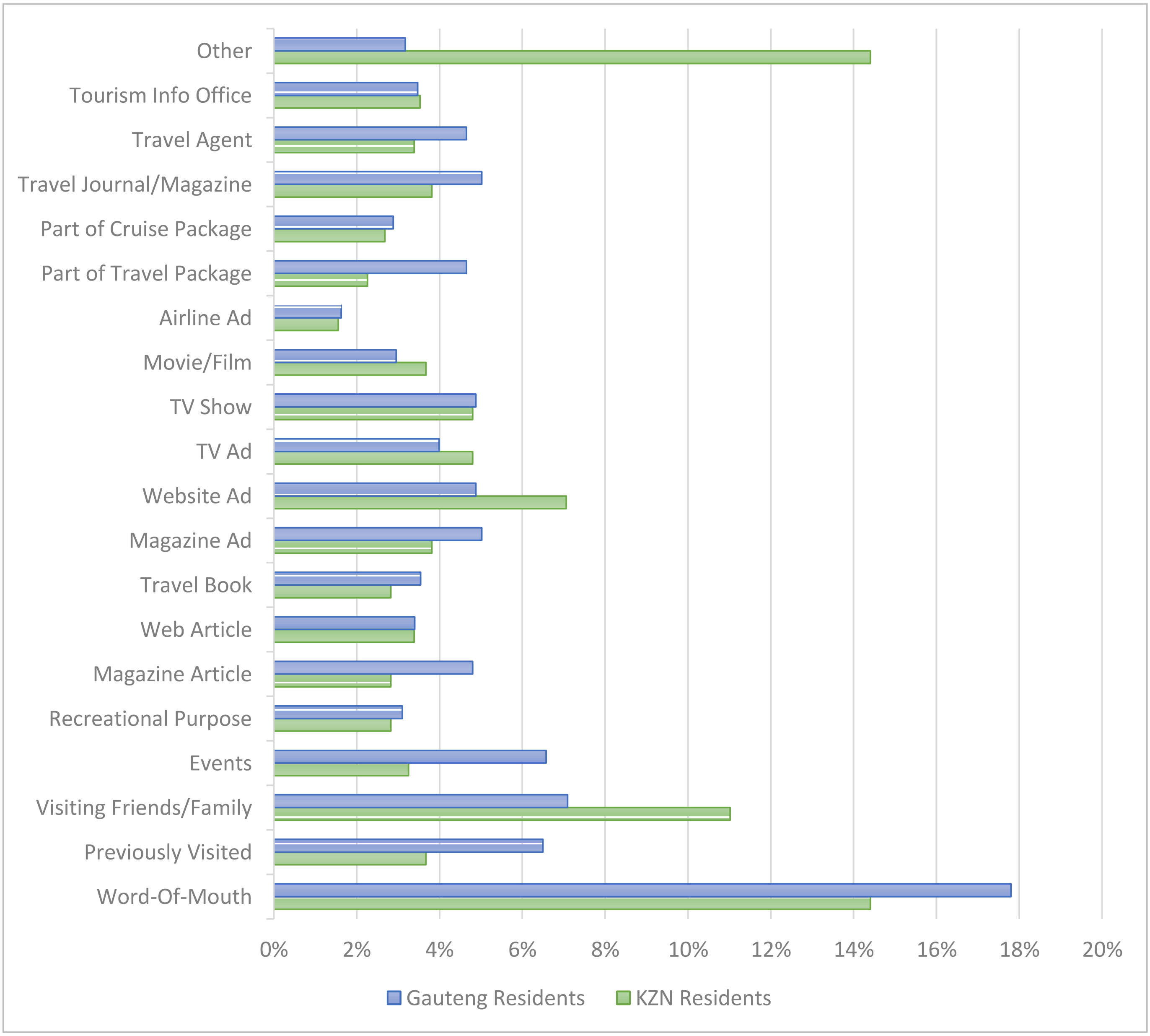
Destination	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Durban	17.5%	69.0%	56.0%	56.7%
Battlefields	6.4%	3.3%	3.6%	3.7%
Zululand	4.5%	2.6%	7.6%	7.2%
Elephant Coast	13.4%	5.4%	5.9%	5.5%
PMB/Midlands	18.9%	5.3%	4.8%	4.6%
Drakensberg	5.2%	7.9%	7.3%	7.9%
North Coast	18.9%	2.3%	5.8%	5.7%
South Coast	15.2%	4.1%	9.0%	8.7%

2.3. INFLUENCE TO TRAVEL

The following set of data outlines the different means in which the respondents are either influenced or motivated by to travel to the various destinations/regions within KZN. The aspects have been shortened in the case of the figure below, however, the table on the next page shows a more descriptive outline of these aspects. It is evident that the majority of the respondents (inclusive of both categories) were influenced to travel by "Word-Of-Mouth", "Visiting Friends/Family", and "Events". Also, a number of respondents noted a "TV Ad" as one of their influencing aspects.



In addition, the data below shows that there are a few variances between KZN and Gauteng residents. For example, KZN residents seem to be more likely to travel because of "VFR" and Gauteng residents seem to be influenced more by "other" reasons, than those listed below. Further, Gauteng residents seem to be influenced more by attending "Events" in KZN, while KZN residents are influenced more by "Website Ad" (or digital marketing). It is evident that "Word-Of-Mouth" is still a common notion that influences the travel patterns of both provincial residents.



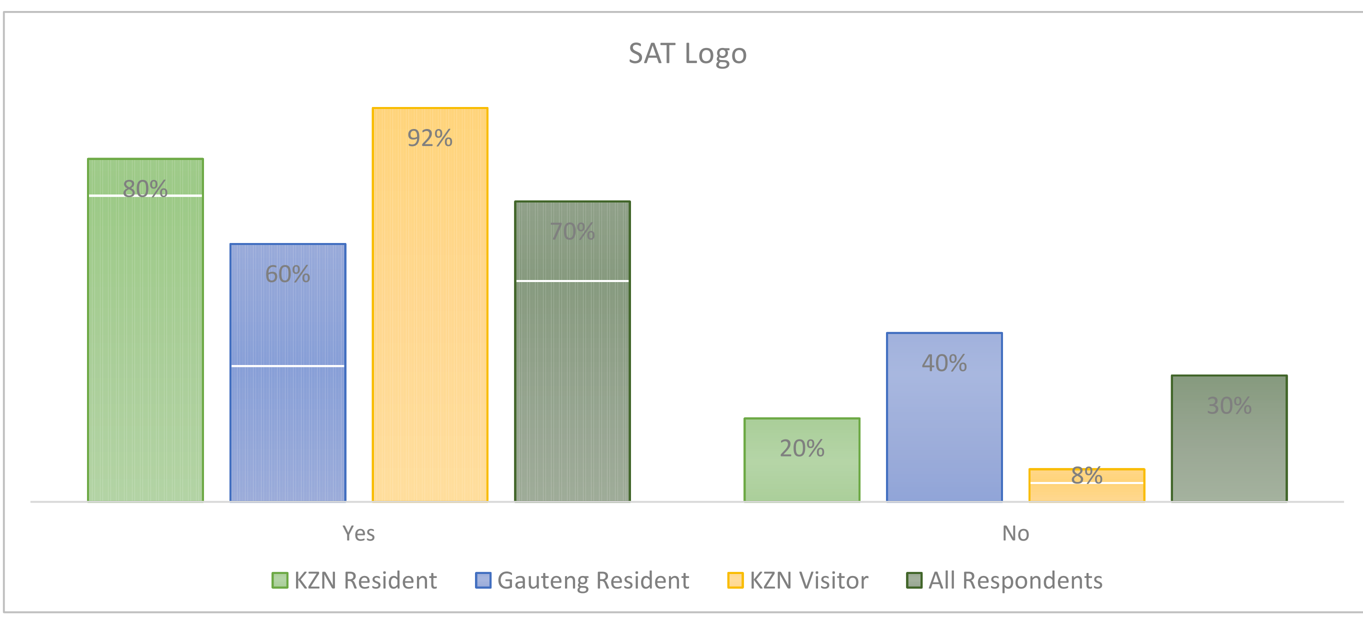
Influence	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Recommended by a friend/colleague/family member	14.4%	17.8%	16.2%	17.0%
Have previously visited this country for business	3.7%	6.5%	5.3%	5.0%
Was visiting a friend/ family member who stays in that area	11.0%	7.1%	9.2%	8.5%
Went for a specific event	3.2%	6.6%	8.4%	7.6%
Went for a specific recreation purpose	2.8%	3.1%	3.6%	3.4%
Read a magazine article describing the region	2.8%	4.8%	3.3%	3.7%
Read an article on a website describing the region	3.4%	3.4%	2.7%	3.1%
Read about the location in a travel book	2.8%	3.5%	3.4%	3.7%
Saw an advertisement in a magazine	3.8%	5.0%	4.9%	5.0%
Saw an advertisement on a website	7.1%	4.9%	5.0%	5.1%
Saw a television commercial	4.8%	4.0%	7.5%	7.7%
Saw a show on television showcasing the region	4.8%	4.9%	5.1%	5.0%
Saw locations of the country in a movie	3.7%	3.0%	2.6%	3.0%
Airline advertised the location	1.6%	1.6%	1.1%	1.1%
Location was just a part of a travel package that was taking me to another country that I wanted to visit	2.3%	4.7%	2.7%	2.6%
Location was just part of a cruise package	2.7%	2.9%	2.5%	2.3%
Read in the travel journal/ magazine about the region	3.8%	5.0%	4.0%	4.3%
Heard about the location from travel agent	3.4%	4.7%	3.9%	4.0%
Told about it in tourism information office	3.5%	3.5%	3.0%	2.8%
Other	14.4%	3.2%	5.5%	5.2%

2.3. BRANDING: SOUTH AFRICA TOURISM & TOURISM KZN

The following section outlines the two logos/branding of South Africa Tourism (SAT) and Tourism KZN (TKZN) and whether the respondents recognize the logo/branding of the two organizations. Further comparisons will also be outlined.

2.3.1. SAT Logo

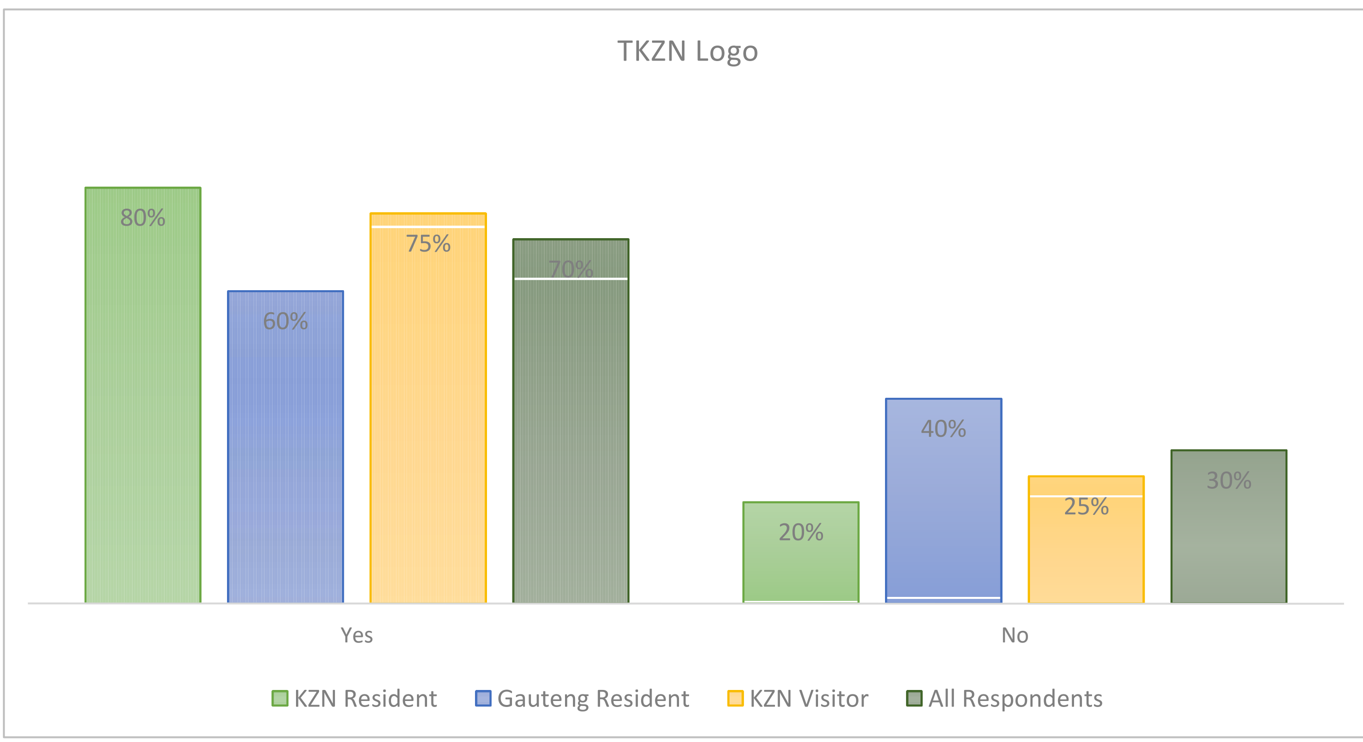
The majority of the respondents have recognized the SAT logo before, with all categories having over 60% recognizing it. It is interesting to note that 40% of Gauteng residents had not seen or recognized the logo before, while only 20% of KZN residents had not recognized it. Further, 92% of KZN visitors had seen the logo before.



SAT Logo	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Yes	80.4%	60.4%	92.3%	70.4%
No	19.6%	39.6%	7.7%	29.6%

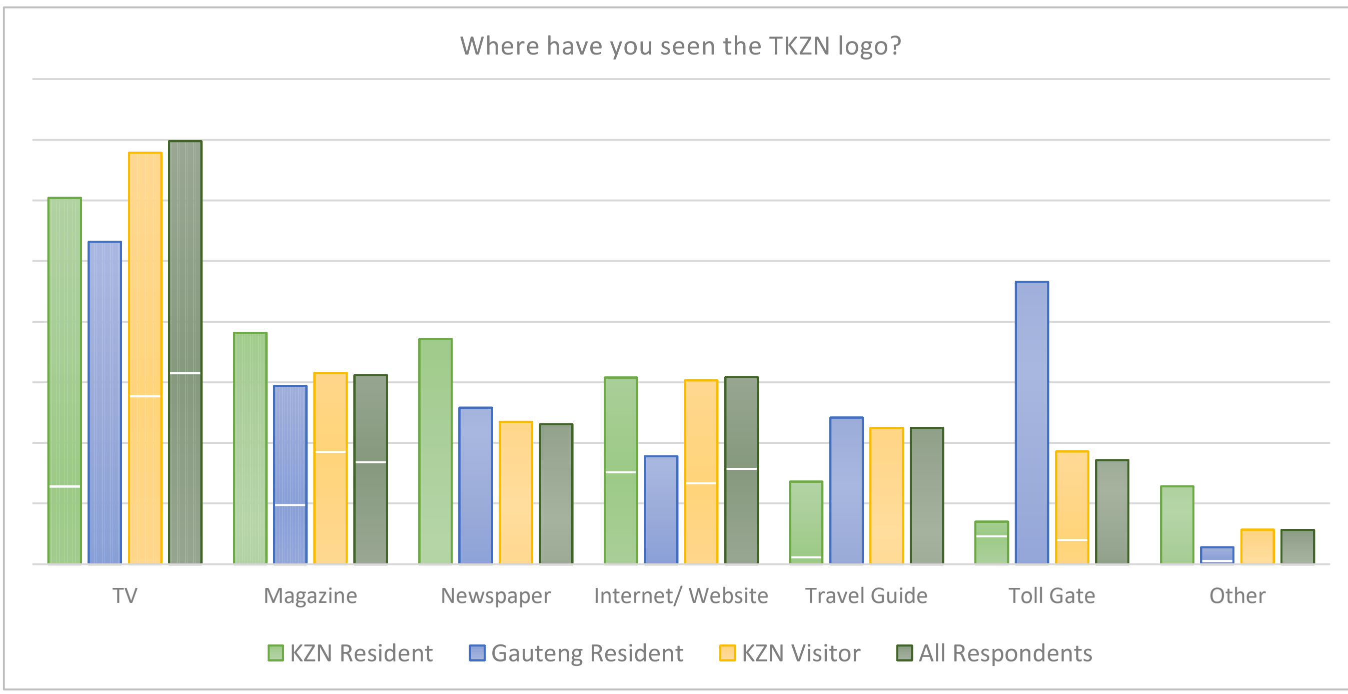
2.3.2. TKZN Logo

The majority of the respondents have recognized the TKZN logo before, with all categories having over 60% recognizing it. It is interesting to note that 40% of Gauteng residents had not seen or recognized the logo before, while only 20% of KZN residents had not recognized it. Further, 75% of KZN visitors had seen the logo before.



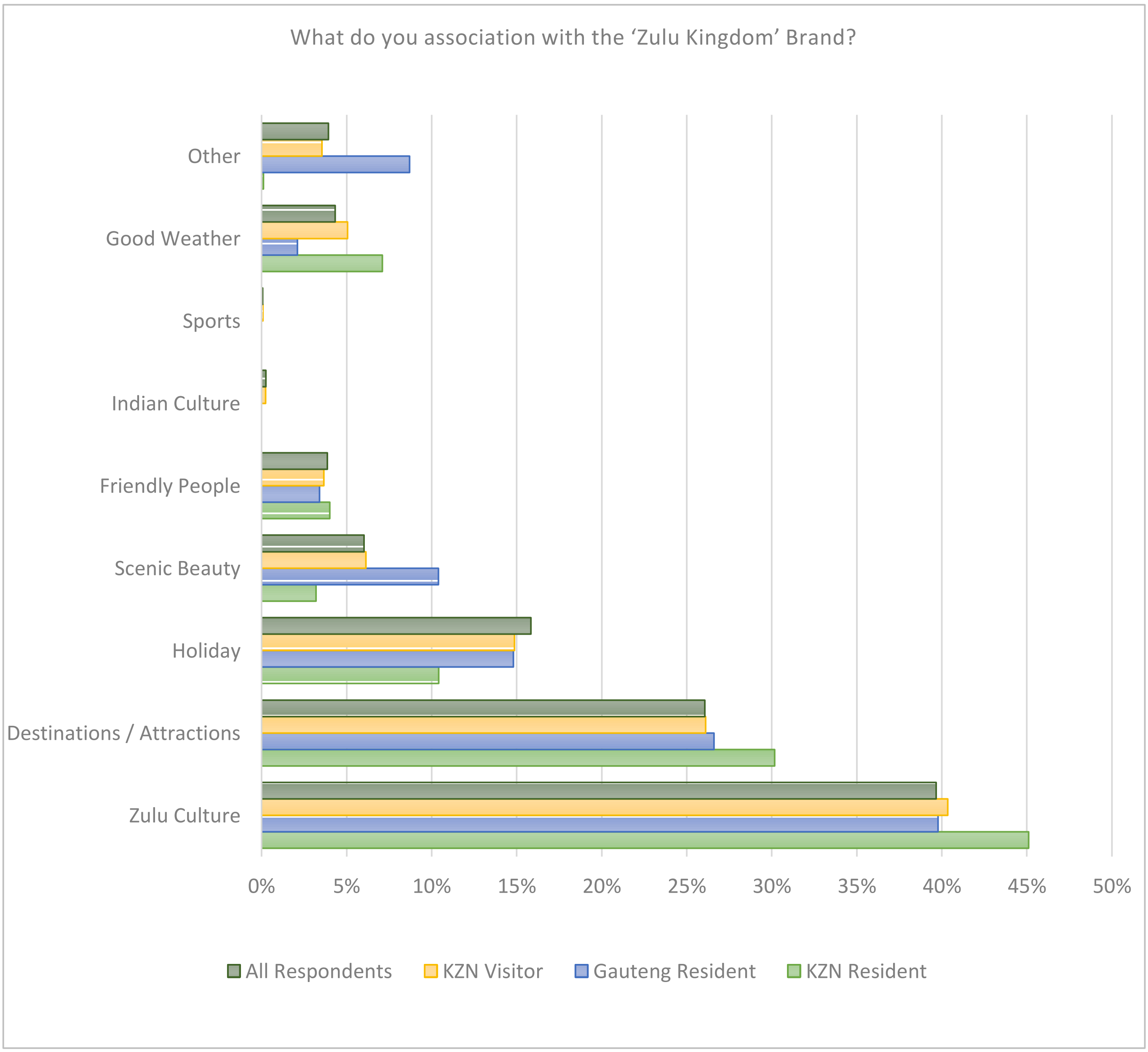
TKZN Logo	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Yes	80.4%	60.4%	75.4%	70.4%
No	19.6%	39.6%	24.6%	29.6%

The majority of the respondents have seen the TKZN logo on “TV” (e.g. a TV advert) with approximately as much as 35% of ‘all respondents’ seeing the logo here. It was interesting to note that 23% of the Gauteng residents had seen the TKZN logo at a “Toll Gate” (as much as 19% more than most other respondents), which shows that the majority of these respondents still drive to or through KZN during their trips. Furthermore, a number of respondents who are KZN residents had seen the logo in “Magazines” (19%) and “Newspapers” (19%). A number of respondents (mainly KZN residents, KZN visitors, and all respondents) had seen the logo on “Internet/Website” (as much as 15%, which shows the importance of having a presence on digital platforms.



TKZN Logo	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
TV	30.2%	26.6%	33.9%	34.9%
Magazine	19.1%	14.7%	15.8%	15.6%
Newspaper	18.6%	12.9%	11.7%	11.5%
Internet/Website	15.4%	8.9%	15.2%	15.4%
Travel Guide	6.8%	12.1%	11.2%	11.2%
Toll Gate	3.5%	23.3%	9.3%	8.6%
Other	6.4%	1.4%	2.9%	2.8%

The majority of the respondents associate the *Zulu Kingdom* brand with the "Zulu Culture" (as much as 45%) and with certain "Destinations / Attractions" within KZN (as much as 30%). It was interesting to note that a higher number of Gauteng residents associated KZN with "Scenic Beauty" (4% more than other respondents), while a higher number of KZN residents associated the brand with "Good Weather", "Destination / Attractions", and "Zulu Culture". The full breakdown is outlined in the table on the following pages.

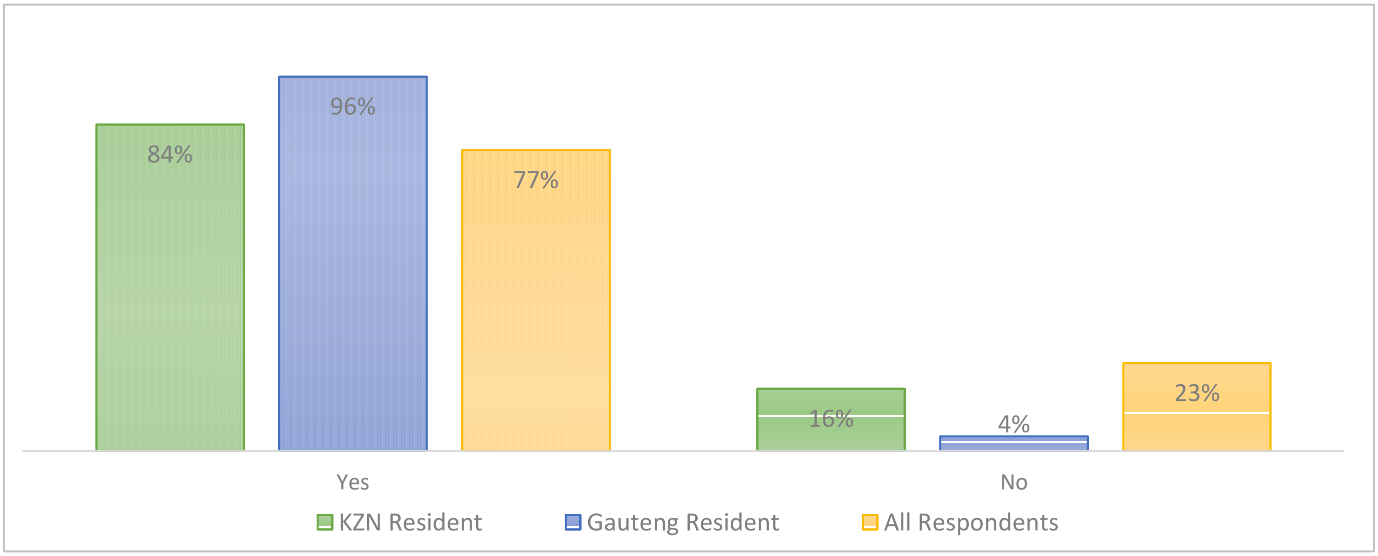


TKZN Logo	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Zulu Culture	**45.1%**	**39.8%**	**40.3%**	**39.7%**
Zulu Kings - King Shaka & others / Zulu Empire	1.8%	6.4%	4.3%	4.2%
Zulu Heritage, Culture & Traditions - Attire, Food, Etc	27.7%	16.6%	19.7%	19.3%
Zulu History - Historical Battles / Shaka's Grave	7.1%	4.1%	4.7%	4.6%
Zulu Reed Dance / Umhlanga	0.4%	0.9%	0.4%	0.5%
Entertainment / Gqom Music	7.1%	4.6%	7.3%	7.1%
Zulu Art - Dance, Beads, Maskandi Music, Etc	0.7%	0.5%	0.3%	0.3%
Zulu Pride / Unity / Cohension / Zulu Nation	0.3%	6.3%	3.3%	3.3%
Inkatha Freedom Party / Politics	0.0%	0.4%	0.3%	0.4%
Destinations / Attractions	**30.2%**	**26.6%**	**26.1%**	**26.1%**
Beach	14.0%	12.9%	15.3%	15.3%
Wildlife / Game Reserves / Nature	12.1%	5.1%	6.1%	6.1%
Moses Mabhida Stadium	1.1%	0.4%	1.1%	1.1%
uShaka Marine World	2.6%	1.9%	2.4%	2.4%
Drakensburg	0.1%	5.8%	0.8%	0.8%
Specific Townships / Places	0.0%	0.0%	0.1%	0.1%
King Shaka International Airport	0.3%	0.5%	0.3%	0.3%

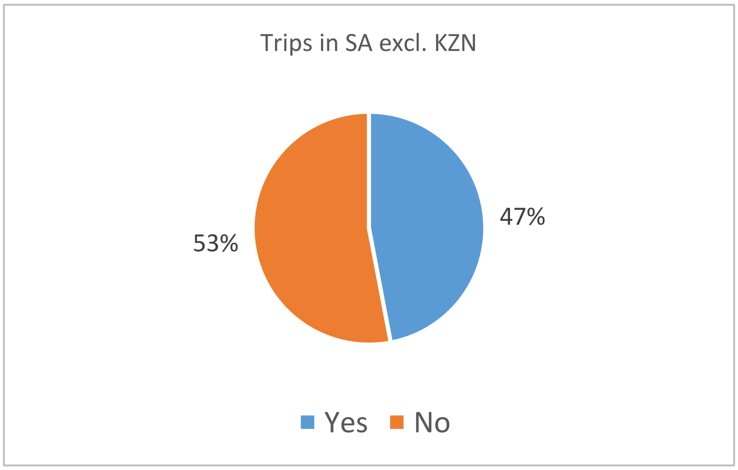
TKZN Logo	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Holiday	**10.4%**	**14.8%**	**14.9%**	**15.8%**
Holiday Destination / Relaxation	3.4%	8.9%	8.1%	8.6%
Fun Place / Different Activities (Museums, Malls, Shopping, Statues)	7.0%	5.9%	6.7%	7.2%
Scenic Beauty	**3.2%**	**10.4%**	**6.1%**	**6.0%**
Scenery - Beautiful Landscape / Mountains	3.2%	10.4%	6.1%	6.0%
Friendly People	**4.0%**	**3.4%**	**3.7%**	**3.9%**
Friendly People / Respectful / Ubuntu	4.0%	3.4%	3.7%	3.9%
Indian Culture	**0.0%**	**0.0%**	**0.2%**	**0.2%**
Indians - Indian Culture / Food	0.0%	0.0%	0.2%	0.2%
Sports	**0.0%**	**0.0%**	**0.1%**	**0.1%**
Sports - Soccer, Comrades Marathon	0.0%	0.0%	0.1%	0.1%
Good Weather	**7.1%**	**2.1%**	**5.0%**	**4.3%**
Good Weather	7.1%	2.1%	5.0%	4.3%
Other	**0.1%**	**8.7%**	**3.5%**	**3.9%**
Proudly South African / S.A Flag	0.1%	2.9%	1.5%	1.3%
I Don't Know	0.0%	5.8%	2.1%	2.6%

2.4. OVERNIGHT VISIT WITHIN KZN

The following section analyses the number of respondents (all respondents) who took an overnight trip within KZN during 2019. It is therefore evident that the vast majority of respondents did take an overnight trip within KZN, with 96% of Gauteng residents and 84% of KZN residents doing so, and once again confirming that the two source markets are vital for domestic tourism in KZN. It also shows that 'all respondents' not only consider taking a trip to KZN, but actually do so.



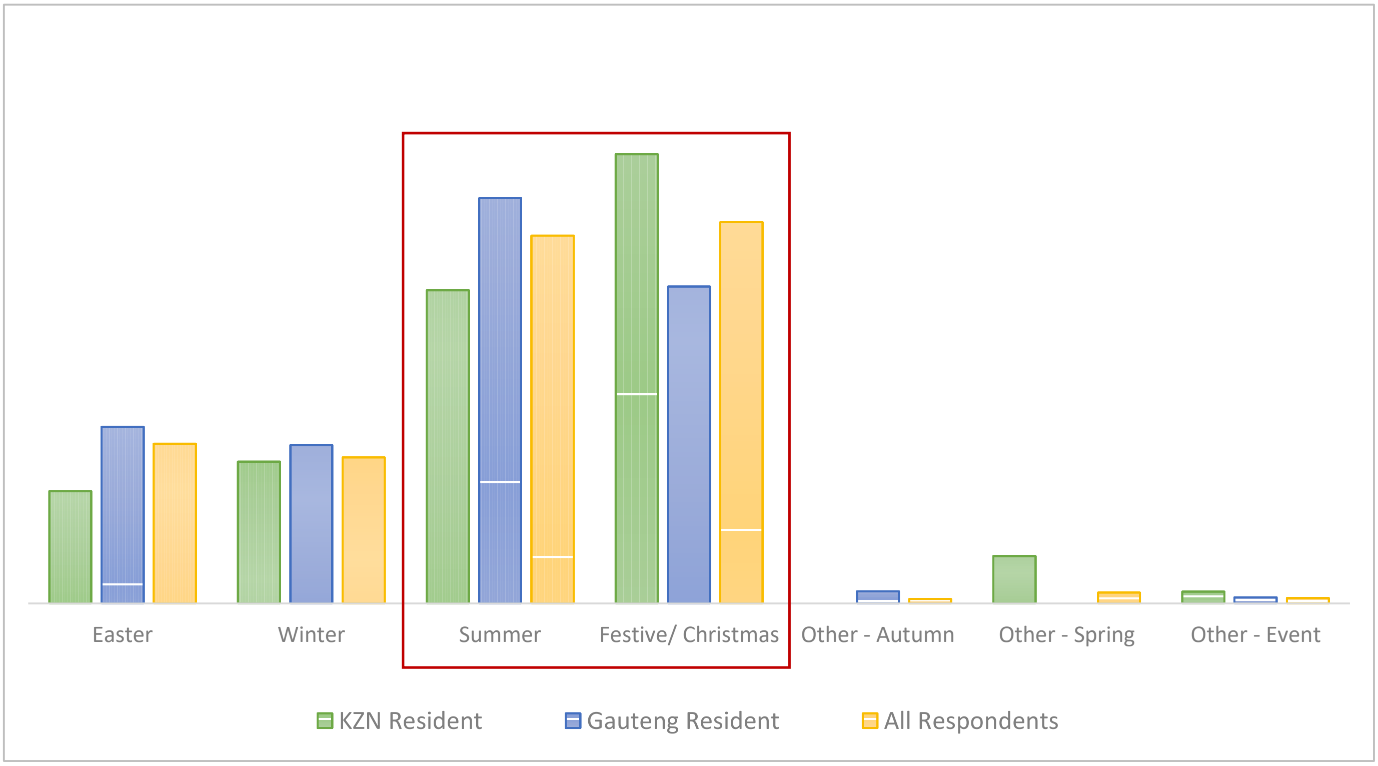
Overnight Trip to KZN	KZN Resident	Gauteng Resident	All Respondents
Yes	84.0%	96.3%	77.4%
No	16.0%	3.7%	22.6%



Further to this, it should also be noted that 53% of **all of the respondents** did not make any domestic trips within South Africa without including KZN as part of their trip. In other words, 47% of the respondents took a trip in South Africa, which excluded KZN. This is a positive finding, yet it also means that some South Africans do not travel to KZN as a "priority" destination and prefer other destinations. These insights should be used in the marketing and promotional activities that TKZN conducts and should also influence the messaging that the organization portrays in these activities.

2.4.1. TIME OF VISIT

In follow up to the previous slide on whether KZN is included in the domestic trips, it is interesting to note that the majority of South Africa domestic tourists (69%) embark on trips during the "Summer" or "Festive/Christmas" seasons. Following this, most tourists travel during the "Easter" (15%) and "Winter" (14%) seasons. These insights are based on travel within ANY province in South Africa, and are not based purely on KZN alone.

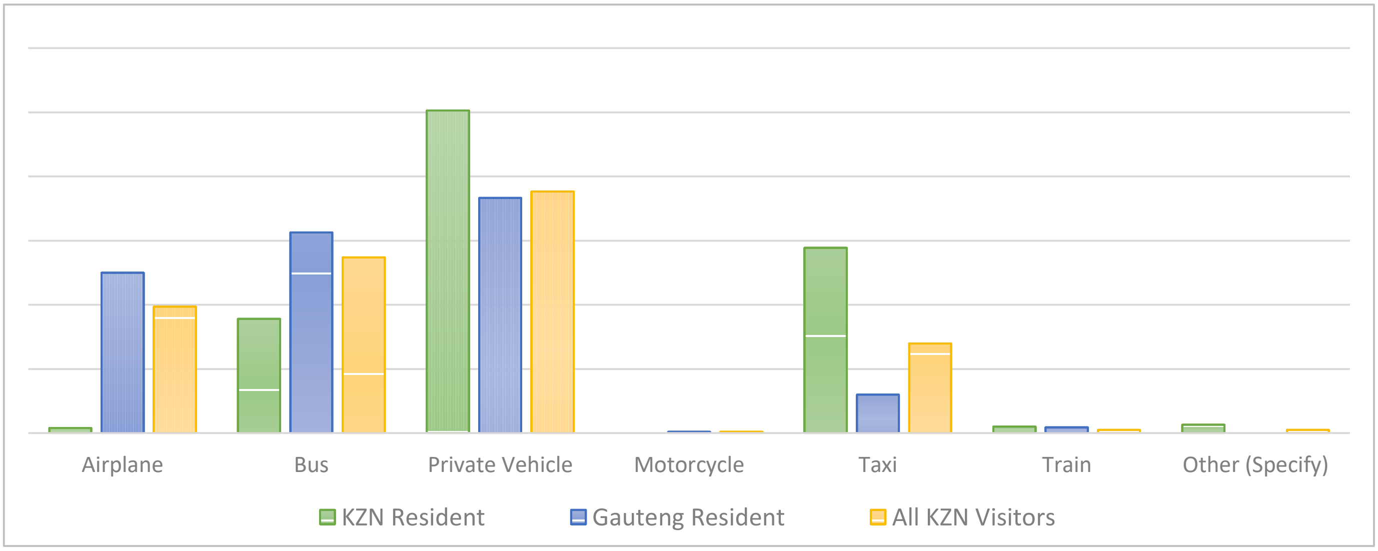


Season of Trip	KZN Resident	Gauteng Resident	All Respondents
Easter	10%	16%	15%
Winter	13%	15%	14%
Summer	29%	38%	34%
Festive/ Christmas	42%	29%	35%
Other - Autumn	0%	1%	0%
Other - Spring	4%	0%	1%
Other - Event	1%	1%	1%

2.5. ANALYSIS OF KZN VISITORS

2.5.1. TRANSPORT MODES

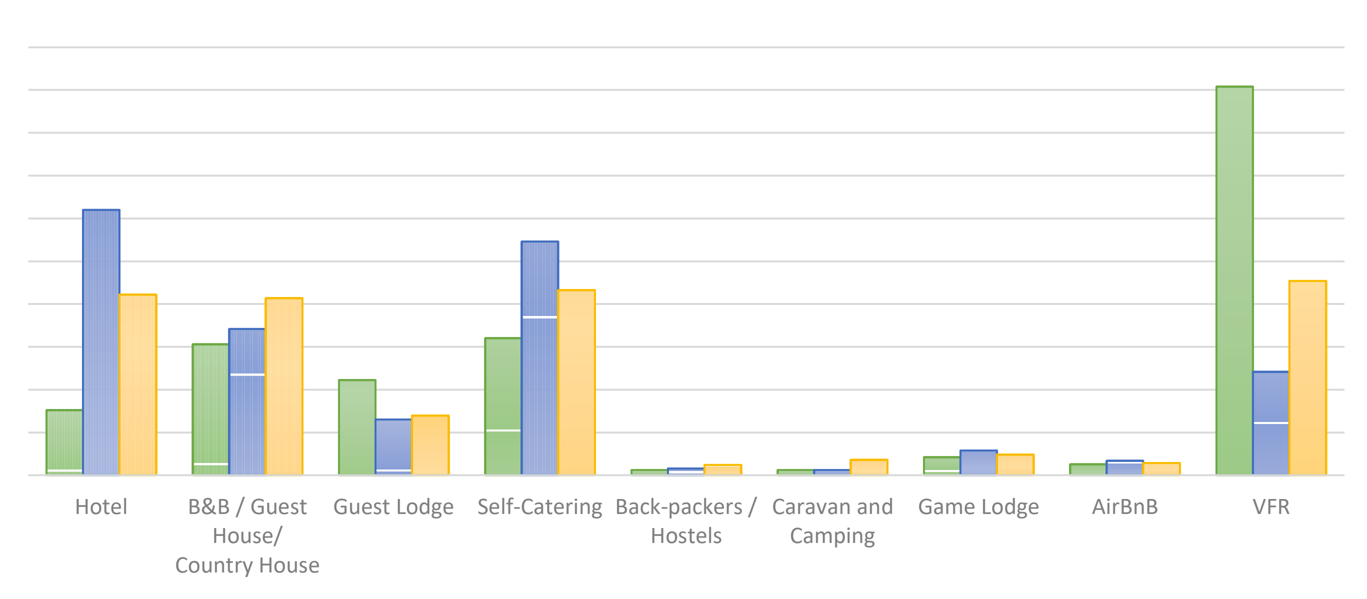
The data below has revealed that the majority of visitors to KZN embark on their trip by using a "Private Vehicle" (38%), a "Bus" (27%), and an "Airplane" (20%). In terms of KZN residents only, the majority use a "Private Vehicle" (50%), while 29% use a "Taxi" and 18% use a "Bus". Further, in terms of Gauteng residents, the majority use their "Private Vehicle" (37%), a "Bus" (31%), and an "Airplane (25%). This information is key in terms of influencing the why TKZN sends out a message for the destination and what promotional activities are conducted. For example, promotional activities can continue to be done at toll roads (as most respondents are driving in their own vehicles). However, new ideas could revolve around activities on busses or in taxis, and at the airports.



Season of Trip	KZN Resident	Gauteng Resident	All KZN Visitors
Airplane	0.8%	25.0%	19.7%
Bus	17.8%	31.3%	27.4%
Private Vehicle	50.3%	36.7%	37.7%
Motorcycle	0.0%	0.2%	0.2%
Taxi	28.9%	6.0%	14.0%
Train	1.0%	0.9%	0.5%
Other (Specify)	1.3%	0.0%	0.5%

2.5.2 ACCOMMODATION TYPES

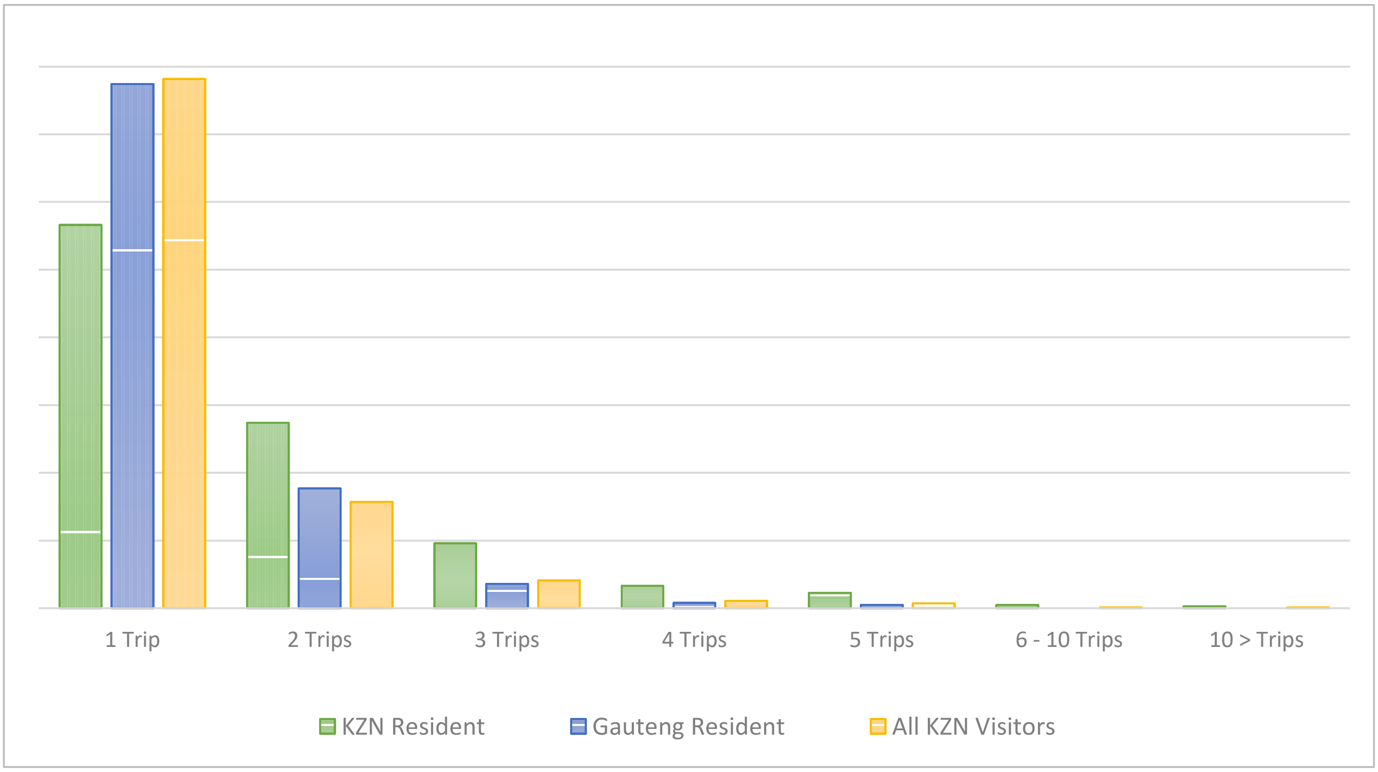
It is evident that the majority of the visitors to KZN choose to stay with their friends or family (VFR or unpaid accommodation), with the majority of KZN residents choosing this option (45%). Following this, most visitors also used self-catering establishments (22%) and B&Bs (21%). Furthermore, a higher number of Gauteng residents stayed in hotels (31%) and in self-catering establishments (27%).



Accommodation	KZN Residents	Gauteng Residents	All KZN Visitors
Hotel	7.6%	31.0%	21.1%
B&B / Guest House/ Country House	15.3%	17.1%	20.7%
Guest Lodge	11.1%	6.5%	7.0%
Self-Catering	16.0%	27.3%	21.6%
Back-packers / Hostels	0.6%	0.8%	1.2%
Caravan and Camping	0.6%	0.6%	1.8%
Game Lodge	2.1%	2.9%	2.4%
AirBnB	1.3%	1.7%	1.4%
VFR	45.4%	12.1%	22.7%

2.5.3. NUMBER OF TRIPS TO KZN

The majority (78%) of all domestic tourists, who visited KZN in 2019, indicated that they generally embark on one trip to KZN within a calendar year. This is the same for both KZN and Gauteng residents, with some slight variances between the two markets. For example, 27% of KZN residents take two trips to KZN whilst only 18% of Gauteng residents do so. Further to this, nearly 77% of Gauteng residents only take one trip to KZN, whilst 57% of KZN residents do so.

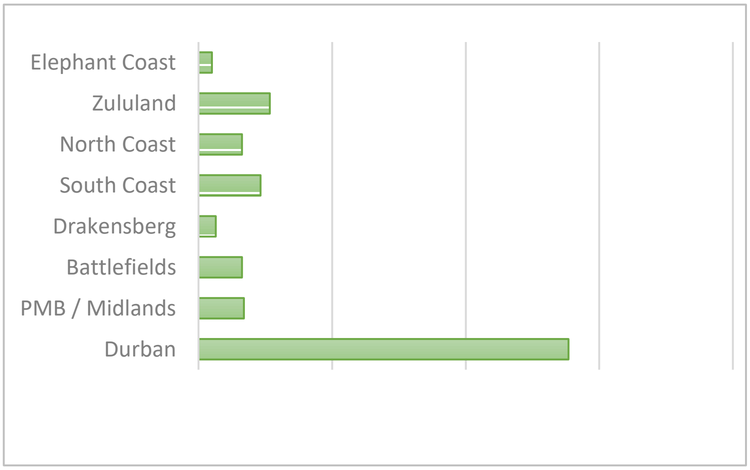


No. of Trips to KZN	KZN Resident	Gauteng Resident	All KZN Visitors
1 Trip	56.6%	77.4%	78.2%
2 Trips	27.4%	17.7%	15.7%
3 Trips	9.6%	3.6%	4.1%
4 Trips	3.3%	0.8%	1.1%
5 Trips	2.3%	0.5%	0.7%
6 -10 Trips	0.5%	0.0%	0.1%
10 > Trips	0.3%	0.0%	0.1%

2.5.4. TOP DESTINATIONS VISITED

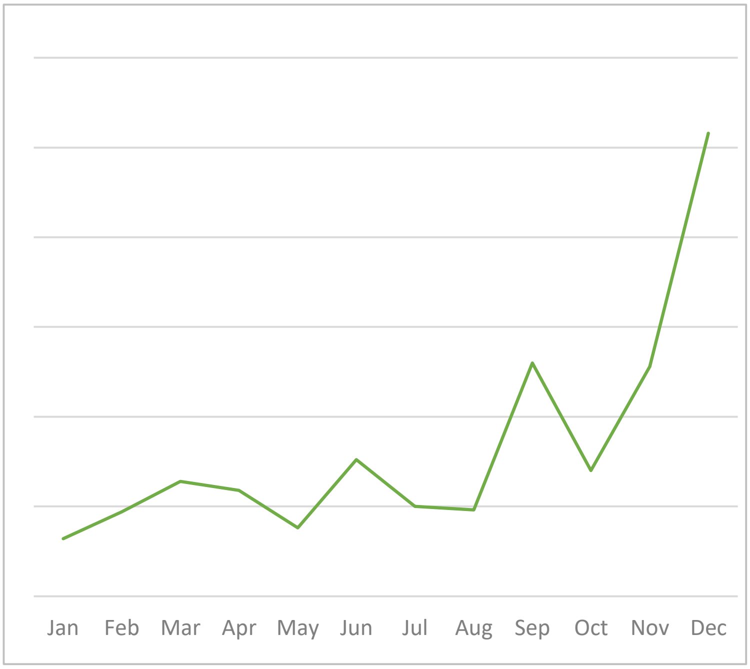
In terms of all visitors to KZN, that were taken by the respondents in 2019, the top destinations (or regions) that were visited was "Durban" (55%) and "Zululand" (11%).

KZN Regions	All KZN Visitors
Durban	55.4%
PMB / Midlands	6.8%
Battlefields	6.5%
Drakensberg	2.6%
South Coast	9.3%
North Coast	6.5%
Zululand	10.7%
Elephant Coast	2.0%



Further to this, the trips taken to these were mainly in December (26%), September, and November (both 13%), which shows that people generally travel near the end of the year into the "Festive Season".

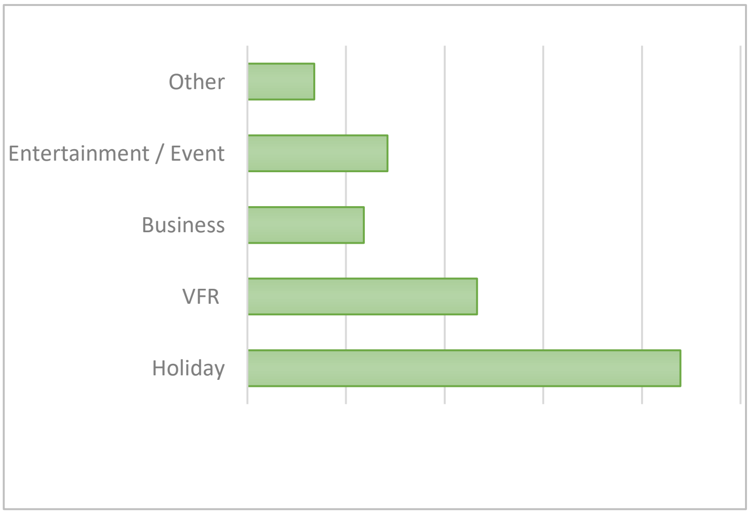
Month of Trip	All KZN Visitors
January	3.2%
February	4.7%
March	6.4%
April	5.9%
May	3.8%
June	7.6%
July	5.0%
August	4.8%
September	13.0%
October	7.0%
November	12.8%
December	25.8%



2.5.5. PURPOSE OF TRIP

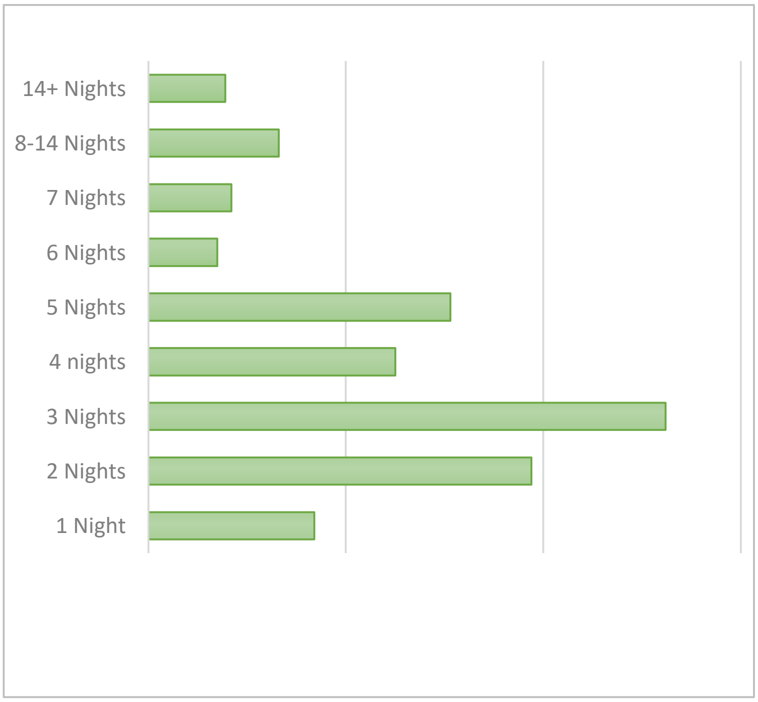
In terms of all visitors to KZN, the majority visited KZN for a "Holiday" (44%) and for "VFR" (23%). "VFR" means that these tourists embarked on a trip to "Visit Friends and Relatives".

Main Purpose	All KZN Visitors
Holiday	43.9%
VFR	23.3%
Business	11.8%
Entertainment / Event	14.2%
Other	6.8%



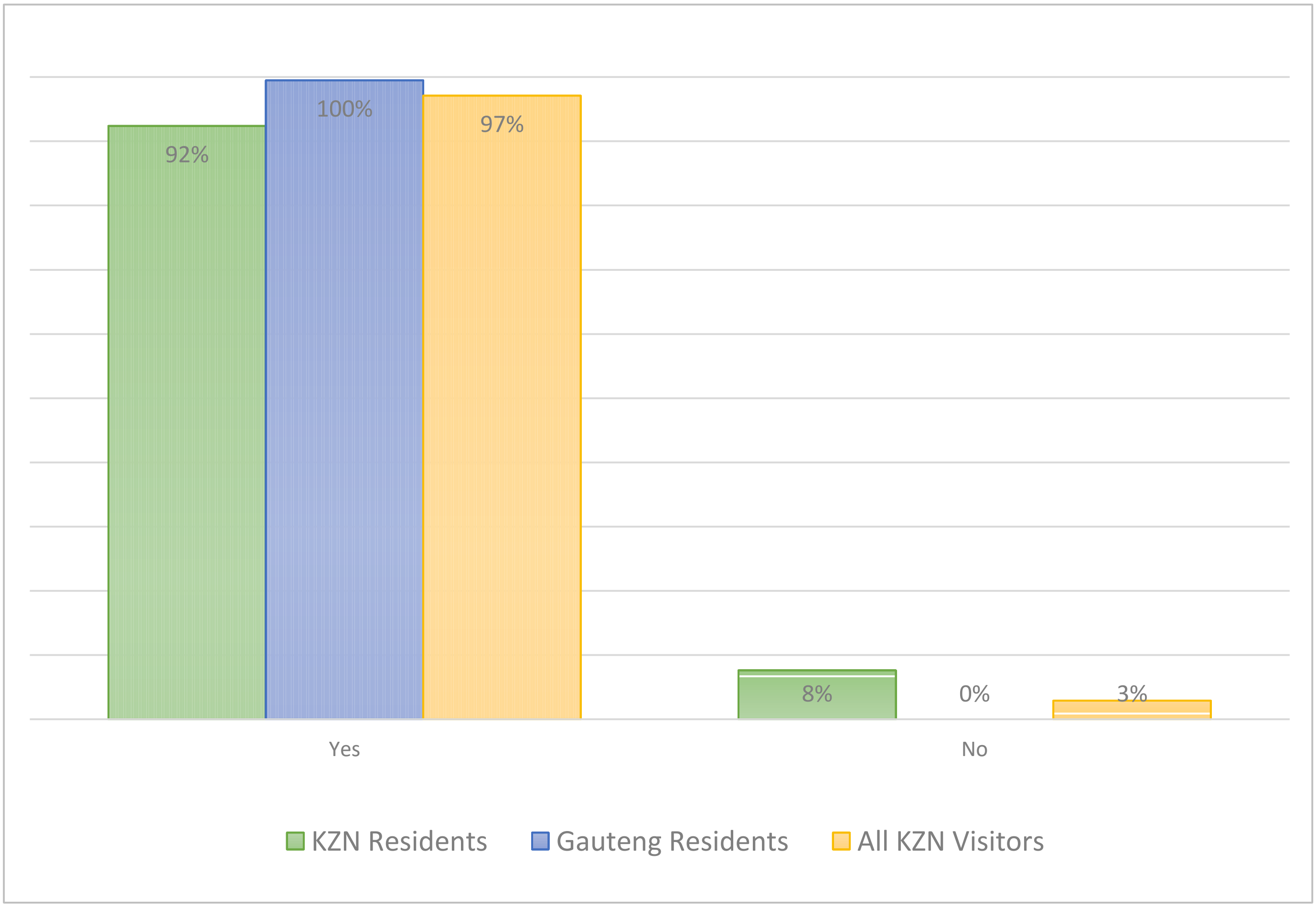
Further to this, during these trips, the majority of the respondents stayed for an average of **4.75 nights** in KZN. In other words, the majority stayed for 3 nights (26%) and 2 nights (19%), while 15% stayed for 5 nights.

No. of Nights	All KZN Visitors
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%



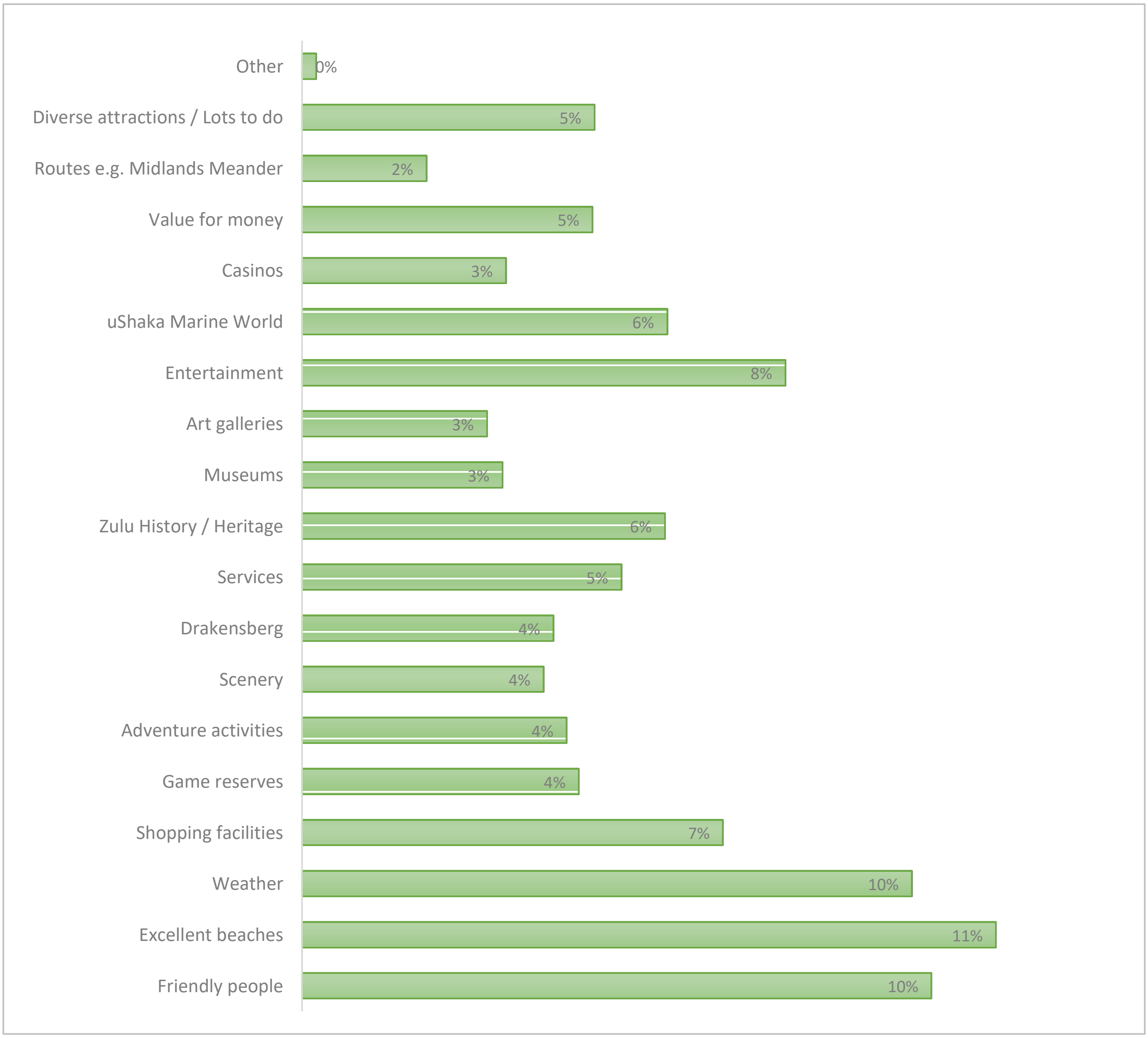
2.6. RECOMMEND KZN AS A TOURIST DESTINATION

In terms of all visitors to KZN, the vast majority (97%) have noted that they will recommend KZN as a tourism destination to their friends and family. Furthermore, all respondents (i.e. 100%) who are Gauteng residents said that they would recommend KZN as a tourism destination, while 92% of KZN residents said that they would. This is a positive finding as it shows that people that have visited the province have had such a good experience that they will want others to have the same experience.



Recommend KZN	KZN Residents	Gauteng Residents	All KZN Visitors
Yes	92.4%	99.5%	97.1%
No	7.6%	0.5%	2.9%

The majority of the visitors to KZN cited the following reasons for recommending KZN as a tourism destination. The top reasons were "Excellent beaches" (11%), "Weather" (10%), "Friendly people" (10%), "Entertainment" (8%), and "Shopping facilities" (7%). These findings are important and should be used in TKZN's messaging through promotional and marketing activities.

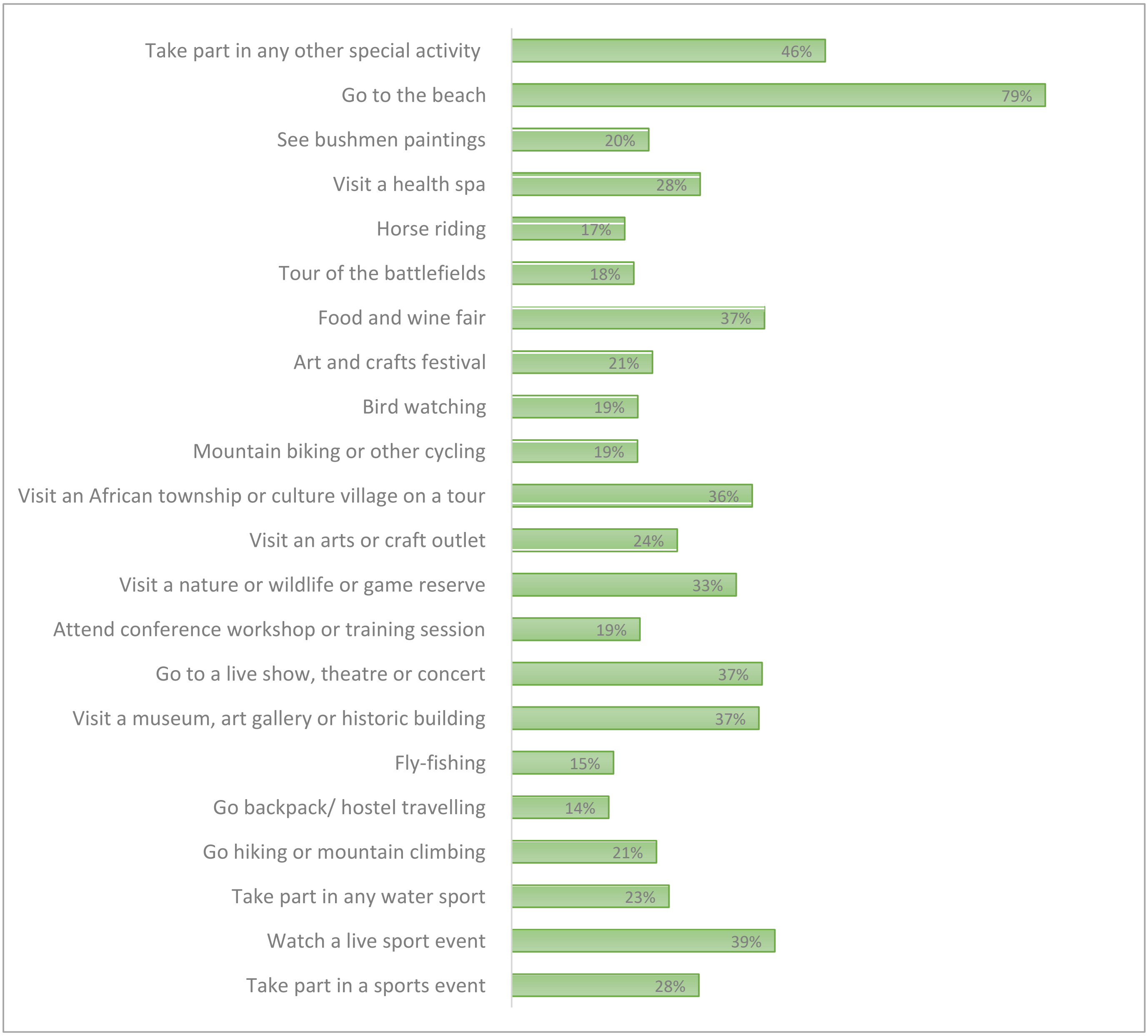


In addition, the majority of KZN residents and Gauteng residents also noted the same reasons for recommending KZN as a tourism destination. Interestingly, some KZN residents noted "Zulu History / Heritage" (7%) as a top reason, while some Gauteng residents noted "uShaka Marine World" (7%) as one of their top reasons.

	KZN Residents	Gauteng Residents	All KZN Visitors
Friendly people	13.0%	9.1%	10.1%
Excellent beaches	15.8%	9.5%	11.1%
Weather	13.9%	9.1%	9.8%
Shopping facilities	7.6%	6.0%	6.8%
Game reserves	4.7%	4.0%	4.4%
Adventure activities	2.7%	5.0%	4.2%
Scenery	4.3%	5.5%	3.9%
Drakensberg	3.7%	4.8%	4.0%
Services	2.0%	5.3%	5.1%
Zulu History / Heritage	7.4%	5.2%	5.8%
Museums	1.9%	3.2%	3.2%
Art galleries	1.1%	3.3%	3.0%
Entertainment	8.3%	6.6%	7.8%
uShaka Marine World	4.5%	6.5%	5.9%
Casinos	1.6%	3.2%	3.3%
Value for money	0.8%	5.8%	4.7%
Routes e.g. Midlands Meander	0.8%	3.5%	2.0%
Diverse attractions / Lots to do	5.1%	4.3%	4.7%
Other	0.9%	0.1%	0.2%

2.7. ACTIVITIES IN KZN

The vast majority of the visitors to KZN have noted that they will "Go to the beach" (79%), "Take part in any other special activity (46%) and "Watch a live sport event" (39%), while there are a number of other secondary reasons as well. The breakdown of KZN residents and Gauteng residents is outlined in the table on the next page. These findings should, once again, influence the messaging that TKZN uses in the marketing and promotional activities.



	KZN Residents	Gauteng Residents	All KZN Visitors
Take part in a sports event	48.1%	33.0%	27.7%
Watch a live sport event	51.9%	40.9%	38.9%
Take part in any water sport	40.4%	27.6%	23.2%
Go hiking or mountain climbing	43.6%	24.6%	21.4%
Go backpack/ hostel travelling	39.1%	15.3%	14.3%
Fly-fishing	37.2%	19.4%	15.1%
Visit a museum, art gallery or historic building	46.8%	39.7%	36.6%
Go to a live show, theatre or concert	54.2%	36.5%	37.0%
Attend conference workshop or training session	17.3%	30.6%	19.0%
Visit a nature or wildlife or game reserve	49.4%	35.7%	33.2%
Visit an arts or craft outlet	42.6%	34.7%	24.5%
Visit an African township or culture village on a tour	57.4%	42.1%	35.6%
Mountain biking or other cycling	40.1%	21.9%	18.6%
Bird watching	39.4%	14.5%	18.7%
Art and crafts festival	41.3%	28.6%	20.8%
Food and wine fair	47.4%	39.1%	37.4%
Tour of the battlefields	38.1%	25.3%	18.0%
Horse riding	40.4%	17.8%	16.7%
Visit a health spa	39.7%	33.8%	27.9%
See bushmen paintings	38.8%	21.9%	20.3%
Go to the beach	73.7%	86.4%	78.9%
Take part in any other special activity	76.3%	48.3%	46.4%

2.7. CONCLUSION

2.7.1. CONCLUDING REMARKS

The study has revealed a number of crucial insights on the 'KZN traveler' which will be used to influence the marketing and promotional activities of TKZN going forward.

It should also be noted that these insights, as they are particular to the domestic tourism markets, will prove to be crucial for TKZN and its marketing activities as it will be the only source market that will be traveling almost immediately following the COVID-19 pandemic. It is estimated, by the Travel and Tourism Research Association (TTRA), that the local tourism will recover (albeit slowly) first, followed by regional travel, and then only international travel.

The key findings, as outlined below, have been used to formulate the recommendations that follow.

2.7.2. KEY FINDINGS

- The majority of the visitors to KZN were between the ages of 25 to 49, were female, and are considered to be in medium to high income households (i.e. most were LSM groups 9 and 10, and 83% were employed in some form or another). Furthermore, 57% are considered to be "Never Married".
- The majority (26%) of the respondents consider KZN as their "top-of-mind" tourism destination in South Africa, with the Western Cape (24%) and Gauteng (14%) following this. The majority of Gauteng residents (30%) consider KZN as their number one tourism destination.
- In terms of "top-of-mind" destinations in KZN, the vast majority of respondents (75%) consider Durban as the number one destination, followed by the South Coast (6%). Interestingly, KZN residents consider the South Coast (26%) and the Elephant Coast (18%) as their "top-of-mind" destinations in KZN.
- The majority of the respondents (17%) have noted "Word-of-Mouth" as the main influencing factor that has determined their choice to travel to and within KZN. Interestingly, a number of KZN residents listed "VFR" (11%) as one of the main factors, while respondents also listed "Went for a specific event" (8%).

KEY FINDINGS (contd.)

- The majority of the respondents (70%) had seen the TKZN logo before, with most respondents having seen it on "TV" (35%), in a "Magazine" (16%), and on the "Internet/Website" (15%). It was interesting to note that 23% of Gauteng residents had seen the logo at a "Toll Gate".
- In terms of the "Zulu Kingdom" brand, the majority of the respondents associated it with "Zulu Culture / Heritage" (40%), and 26% associated it with "Destinations /Attractions" within KZN (e.g. beaches, Drakensberg, and so on).
- Of all the respondents, 77% had undertaken an overnight trip within KZN. The majority of which undertook their domestic overnight trip during the "Festive Season" (35%), followed by "Summer" (34%), "Easter" (15%), and "Winter" (14%). Interestingly, most KZN residents travel for the "Festive Season" (42%).
- The vast majority of respondents (38%) make use of their private vehicles for travel to and within KZN. This is followed by the use of an airplane (excluding KZN residents) (20%) and a bus (27%). A high number of KZN residents (29%) also make use of mini-bus taxis for their domestic trips.
- In terms of accommodation, most visitors to KZN make use of "VFR" (i.e. staying in unpaid accommodation) (23%), which is followed by "Self-Catering" (22%), "Hotel" (21%), and "B&B/Guesthouse" (21%). Interestingly, most KZN residents stay with "VFR" (45%), while most Gauteng residents stay in "Hotels" (31%).
- On average, the majority (78%) of the visitors to KZN make one (1) domestic trip to and within KZN during a calendar year, while 16% make two (2) trips in the year. This trend is very similar for both KZN and Gauteng residents.
- In terms of actual trips taken to KZN, most of the visitors visited Durban (55%), with 11% visiting Zululand and 9% visiting the South Coast region. The majority of these trips were taken during December (26%), September (13%) and November (13%). This shows that people tend to travel more during the end of the year and into the Festive Season.
- The majority of visitors to KZN travelled for the sole purpose of a "Holiday" (44%), while 23% travelled for "VFR". Also, 14% of the visitors travelled to KZN for an event of some sort.

KEY FINDINGS (contd.)

- The average length of stay for these domestic trips was 4.75 nights (i.e. 4-5 nights). The majority of the visitors were in KZN for 3 nights (26%) and 2 nights (19%).
- It was important to note that 97% of all visitors to KZN said that they would recommend KZN as a tourism destination to their family and friends. Furthermore, 100% of Gauteng residents and 92% of KZN residents said that they would recommend KZN.
- The majority of the visitors (as above) cited the following reasons for recommending KZN – “Excellent beaches” (11%), “Friendly people” (10%), and “Weather” (10%). Also, “Entertainment” (8%) and “Shopping” (7%) were also reasons that were cited by the visitors.
- In terms of activities, the majority of the respondents plan to take part in the following on their next trip to KZN – “Go to the beach (7%) and “Go to a live show, theatre, concert (6%).

2.7.3. RECOMMENDATIONS

The following recommendations have been drawn from the findings above:

1. It is important to run campaigns for the “VFR” market, for a number of reasons. Firstly, it is considered a top “influence” for travel for many visitors to KZN and it is also the most popular for accommodation choices. Secondly, the “VFR” market is expected to increase greatly after the COVID-19 pandemic as people will choose travel to reconnect with family, over travel for a holiday.
2. It is important to run campaigns according to the most popular times for travel, both during and prior to these periods. There are a number of campaigns that are already active for the “Summer” and “Festive Season” seasons, but it would also be worthwhile to look into running marketing in preparation for expected travel in September and November.

RECOMMENDATIONS (contd.)

3. It is also recommended that certain promotional activities could be conducted according to transport modes. Firstly, toll gate campaigns have been, and will always be quite effective (as the majority of visitors travel in private vehicles). Secondly, advertising could be placed in taxis, busses and airplanes as these are also widely used forms of transport. In addition, campaigns could also be conducted as the points of departure such as bus stations and airports.

4. It is important to consider a number of the factors into the messaging for both traditional and digital/social)media. For example, it was noted that most visitors would recommend KZN because of its “excellent beaches” and most visitors noted that they will “go to the beach” on their next trip to KZN. It is therefore evident that KZN needs to continue to include “beaches” in the messaging. This also applies to other cited reasons for recommending KZN, which includes KZN’s people and weather. Tourists thrive on experiences, and the weather and people can certainly enhance visitor’s experiences at no cost to the province.

5. In general, TKZN could also look deeper into certain aspects that are on the lower spectrum in terms of data. In other words, insights could be obtained in terms of why the “Battlefields” region has a lower interest in the minds of domestic tourists, when compared to other regions. Also, insights could be obtained on why certain activities are less popular than others (e.g. .bird watching and fly-fishing)