South Africa
KWAZULU-NATAL
*Zulu Kingdom. **Exceptional***

2013 STATISTICS
OF OUR TOURISM SECTOR

SOME USEFUL STATISTICS – 2013
THE FOREIGN PICTURE
What is the size of the global foreign tourism market?

Global Foreign Tourism Market 2012

	World	Africa	South Africa	KZN
Size	1.035bn[1]	53mn[1]	9.19mn[4]	±891 822 (±363 555*)
Growth (%)	3.8%[1]	3.6%[1]	10.2%	-1.8%[4]
Direct Spend (Tourism Receipts)	U$1.075bn[1]	U$33.6bn[1]	R76.4bn[4] (excluding CAPEX) R78.4bn (including CAPEX)	R6.7bn[4]
Daily Spend	-	-	R1 130[4]	R1 089[4]
Average Stay (nights)	-	-	7.7 nights[4] (most common 2 nights)	Avg 6.9 nights[7] (5.921mn bednights in total)[4]

Source: WTO 2013[1], WTTC[2], SAT[4], TKZN[5], *African air and overseas departures 2012. KZN 9.7% of RSA's total of 67.5mn bednights in 2012[7].

Global Tourism Contribution 2012

	World	Africa	South Africa	KZN
Number Directly Employed	101mn*	8.2mn*	±619 500*	±107 177***
Total Employed	261.4mn*	19.3mn*	±1.399mn*	±242 035***
Contribution to GDP %	9.1%*	±9.9%*	±9.7%*	±5.7%#
Total Direct Contribution to GDP (Foreign + Domestic)	US$ 2 056.7bn*	U$72.6bn*	±R100bn*	±R20.07bn***
Total Contribution to GDP (Foreign + Domestic)	U$6 631bn*	U$172.4bn*	±R309bn*	±R28.3bn***

Source: IHS Global#, WTTC 2013*, SAT**, TKZN*** 2012, **** Stats SA derived from GDPR for KZN Current Prices - domestic and international+ Stats SA derived from GDPR for KZN Constant Prices

The Tourism Top 10 Global Destinations 2012 (million)

1. France	83.0	6. Turkey	35.7
2. USA	67.0	7. Germany	30.4
3. China	57.7	8. UK	29.3
4. Spain	57.7	9. Russian Federation	25.7
5. Italy	46.4	10. Malaysia	25.0

(34. South Africa) Source: UNWTO 2013

The Tourism Top 10 Global Spenders 2012 (US$ billion)

1. China	102.0	6. France	37.2
2. Germany	83.8	7. Canada	35.1
3. USA	83.5	8. Japan	27.9
4. UK	52.3	9. Australia	27.6
5. Russian Federation	42.8	10. Italy	26.4

(39. South Africa 4.2) Source: UNWTO 2013

The Top 10 Global Generators of Tourists 2012

1. Hong Kong, China	84 816 000	6. Russian Federation	43 726 000
2. Germany	74 192 000	7. Canada	30 450 000
3. China	70 250 000	8. Italy	29 295 000
4. USA	58 497 000	9. France	26 155 000
5. UK	56 836 000	10. Netherlands	18 560 000

(SA 5 455 000) Source: UNWTO 2013

The South African Foreign Picture 2012

Numbers of Foreign Tourists	9.2mn
Spend - pppd	R1 130 (R8 700 per trip)
Average Length of Stay	7.7 nights
Main Overseas Source Markets	UK, USA, Germany, China, France, Australia

Source: SAT 2013

South Africa's Top 5 Overseas (Long Haul) Tourist Markets 2012

1. UK	438 023
2. USA	326 643
3. Germany	266 333
4. China	132 334
5. France	122 244

Source: SAT 2013

South Africa's Top 5 Average Spending Markets Per Trip (excluding Capital Expenditure)

1. China	R18 500
2. Australia	R15 200
3. USA	R14 300
4. Angola	R14 200
5. Netherlands	R13 900

Source: SAT 2013

Purpose of Visit to South Africa

	All Foreign Tourists (2012)
Holiday	18.7%
VFR	27.7%
Shopping	25.9%
Business Travel	12.6%
Other	6.4%
Medical	3.0%
Business Tourism	6.1%

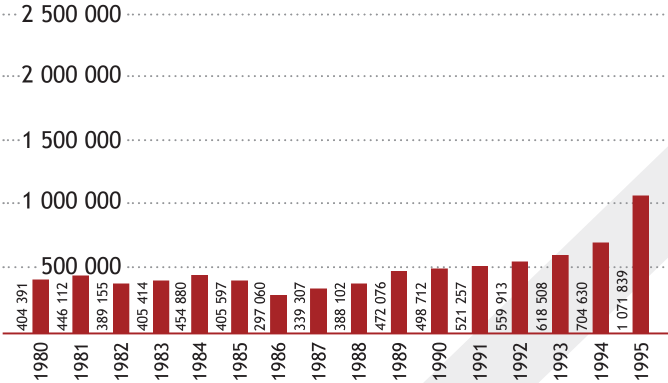
Source: SAT 2013

Foreign Tourist Activities in South Africa 2012

Shopping	82%
Nightlife	69%
Social	41%
Visiting Natural Attractions	16%
Business	16%
Cultural, Historical, Heritage	16%
Beach	12%
Wildlife	10%
Theme Parks	10%
Casino	6%

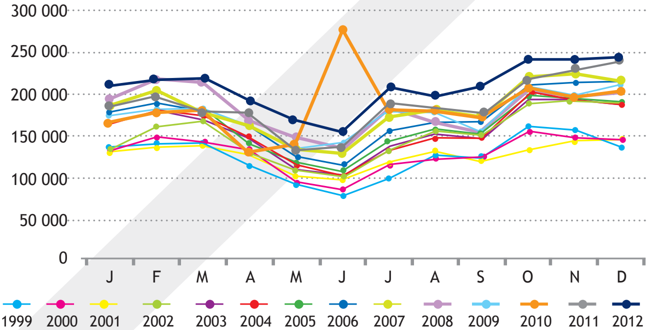
Source: SAT 2013

South Africa's Overseas (Long Haul) Visitors 1980 - 2012



Source: SAT 2013

Overseas Tourist (Inbound Long Haul) Seasonal Flow 1999-2012



Source: SAT 2013

The South African Domestic Tourism Picture 2012

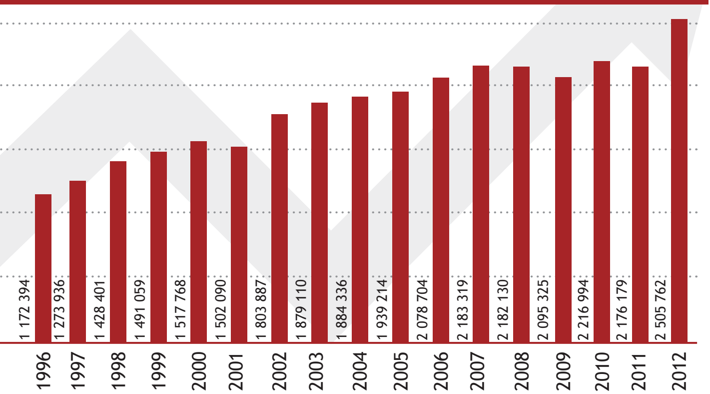
Numbers of Tourists Annually	25.4mn trips, 12.5mn travellers
Spend - Per Trip	±R850; R180 per day
Spend - Total Market Value	R21.8bn direct spend
Average Length of Stay	4.8 nights
Main Source Markets	Gauteng, KZN, Limpopo

Source: SAT 2013

Purpose of Visit

VFR	72.3%
Holiday	11.6%
Business	6.7%
Religious	7.7%
Medical	0.5%

Source: SAT 2013



Top 5 South African Domestic Tourism Source Markets 2012	
1. Gauteng	10.1mn
2. KwaZulu-Natal	5.6mn
3. Limpopo	3.8mn
4. Western Cape	2mn
5. Eastern Cape	1.6mn

Source: SAT 2013

KwaZulu-Natal - The Foreign Tourist Picture 2012	
Number of Visitors Annually	±891 822
Average Spend per Visitor	±R7 517 per trip, R1 089 per day
Spend - Total Market Value	R6.7billion
Length of Stay: Average	6.9 nights
Main Overseas Source Markets	UK, USA, Germany, India, Netherlands

Source: SAT 2013

KwaZulu-Natal's Top Ten Foreign Tourism Source Markets 2012					
1. Swaziland	242 149	28.4%	6. Germany	36 488	3.5%
2. Lesotho	121 367	14.3%	7. India	23 704	2.9%
3. Zimbabwe	66 527	7.9%	8. Netherlands	23 351	2.8%
4. UK	53 877	5.8%	9. Australia	22 619	2.7%
5. USA	46 383	5.0%	10. France	19 804	2.6%

Source: SAT 2013

KwaZulu-Natal's Top Long Haul Source Markets

2012	2011	2010	2009	2008	2007
1. UK	1. UK	1. UK	1. UK	1. UK	1.UK
2. USA	2. USA	2. USA	2. USA	2. USA & Canada	2.USA & Canada
3. Germany	3. Germany	3. Germany	3. France	3. France	3.Germany
4. India	4. France	4. France	4. Germany	4. Germany	4.France
5. Netherlands	5. Netherlands	5. Australia	5. Netherlands	5. Netherlands	5.Netherlands
6. Australia	6. Australia	6. Netherlands	6. Australia	6. Australia	6.Australia

Source: SAT 2013

Purpose of Visit to KZN – Overseas and African Air Departures 2011

Holiday	57.5%
Business	18.6%
VFR	18.8%
Other	5.1%

Source: SAT 2012

Purpose of Visit to KZN – Land Departures 2011

Holiday	32.7%
Business	37.6%
VFR	23.8%
Other	3%

Source: SAT 2012

Destinations Visited in KZN - Overseas and African Air Departures 2011

Durban	70.3%
Pietermaritzburg	8.4%
Zululand	14.5%
Drakensberg	15.8%
Elephant Coast	22.3%
North Coast	13.6%
South Coast	8.1%
Battlefields	3.3%

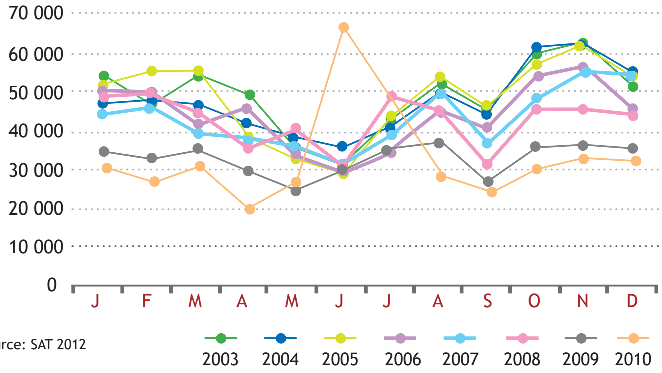
Source: SAT 2012

Some Activities Undertaken in KZN – African Land, African Air Departure and Overseas Visitors 2012

	Land	Africa Air	Rest of World
Nightlife	48.7%	49.2%	65.4%
Shopping	81.6%	64.8%	62.8%
Visiting Natural Attractions	9.3%	24.7%	47.9%
Beach	43.0%	56.3%	51.6%
Wildlife	5.0%	14.7%	38.3%
Cultural, Historical and Heritage	11.4%	18.2%	26.1%
Social	49.8%	27.7%	26.3%
Business	6.6%	31.8%	24.0%
Theme Parks	8.4%	22.5%	21.3%
Adventure	0.0%	9.7%	17.7%
Visited a Casino	5.1%	19.6%	11.5%
Sporting - Spectator	0.0%	0.0%	2.6%
Education	2.5%	7.2%	3.3%
Sporting - Competed	0.0%-	0.0%	1.8%
Hunting	0.0%	0.0%	1.2%
Medical	0.0%	0.0%	0.7%
Health	3.2%	9.7%	5.7%
Trading	6.8%	5.2%	2.3%

Source: SAT 2013

South African Air Arrivals and Overseas (Long Haul) Visitors that Visited KZN - Seasonal Pattern



Source: SAT 2012

KZN – The Domestic Tourist Picture 2012

Number of Visitors Annually	±6.2mn trips*
Average Spend Per Trip	±R670
Spend – Total Direct Value	±R5.28bn
Average Length of Stay	4.6 nights
Main Source Markets	KwaZulu-Natal, Gauteng

Source: SAT 2013

KZN – Top 5 Domestic Source Markets 2012

1. KwaZulu-Natal
2. Gauteng
3. Free State
4. Mpumalanga
5. Limpopo

Source: TKZN 2013

KZN – Top Source Markets for Holiday Makers 2009

1. Gauteng
2. KwaZulu-Natal
3. Limpopo/Mpumalanga
4. Free State
5. North West/Northern Cape

Source: TKZN 2010

Purpose of Visit to KZN – Domestic Visitors 2012

VFR	49.2%
Holiday/Leisure	34.2%
Business	12.3%
Other	4.3%

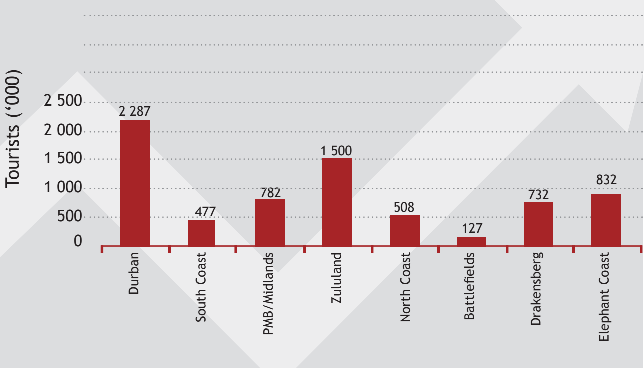
Source: TKZN 2013

Activities Undertaken in KZN - Domestic Visitors 2012

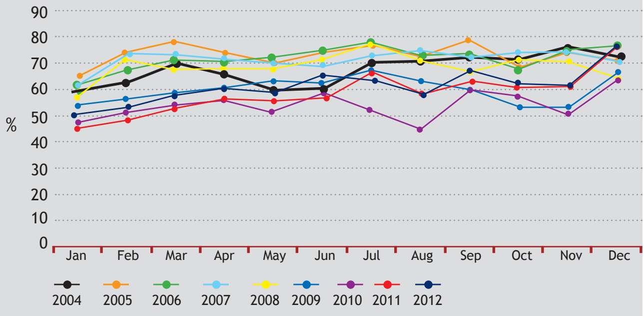
Activity	%
Go to the beach	60.1
Go to a live show, theatre or concert	18.2
Watch a live sports event	23.5
Visit a museum, art gallery or historical building	29.2
Visit a nature or wildlife or game reserve	27.9
Take part in a sports event	16.5
Take part in any water sport	13.0
Visit an arts or craft outlet	12.9
Visit an African township or cultural village on a tour	17.5
Food and wine fair	12.9
Go hiking or mountain climbing	14.7
Bird watching	4.6
Art and crafts festival	5.9
Attend a conference, workshop or training session	22.5
Visit a health spa	10.3
See bushman paintings	4.8
Fly-fishing	4.6
Horse riding	2.6
Go backpack/hostel travelling	8.2
Mountain biking or other cycling	7.1
Tour of the Battlefields	2.4

Source: SAT 2013

Destinations Visited in KZN – Domestic Tourists 2013



Hotel Room Occupancy % Graph KZN 2004-2012



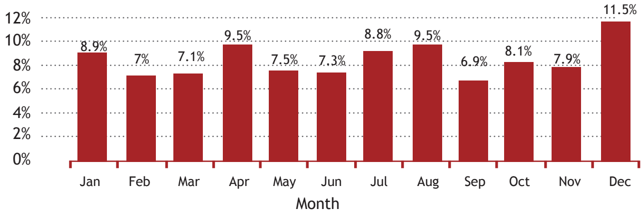
Source: FEDHASA (KZN), STR Global June, 2013

KwaZulu-Natal Supply Statistics 2012

Hotels	269
Guest Houses	345
Lodges	194
Bed and Breakfasts	696
Caravan and Camp Sites	88
Self-Catering	814
Youth Hostels/Backpackers	36
Conference Venues	281
Tourist Guides	1 004
Tour Operators	448

Source: TKZN July 2013

KZN Domestic Seasonal Flow 2012



Source: SAT 2013

Relative Market Potential
Input - Key Consumer Segment Profiles

0 1 2 3 4

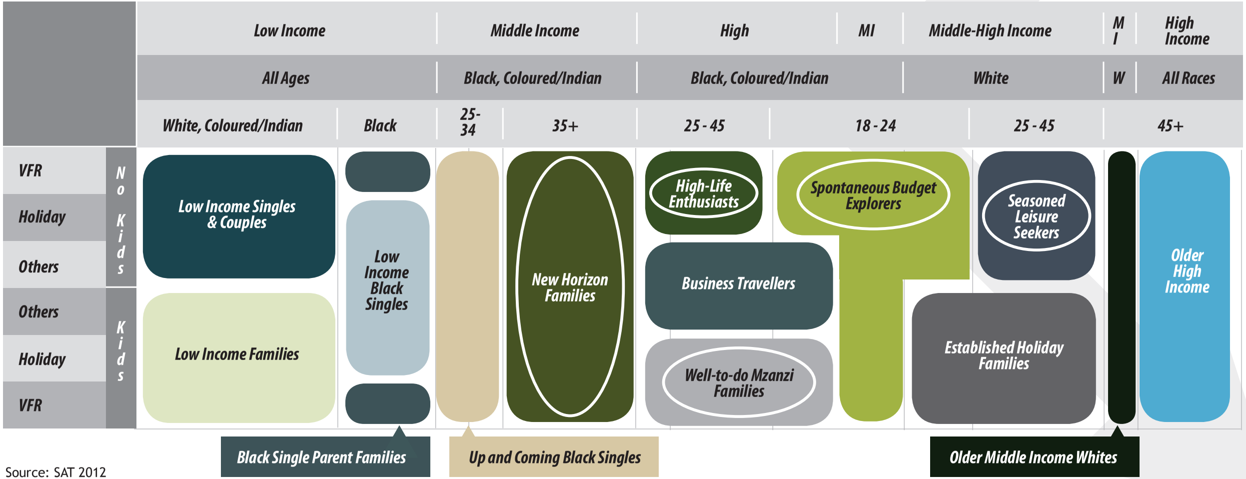
	Key Consumer Segments	Natural Beauty	Viewing Wildlife	Exploring the Culture	Visiting Moun-tains	Visiting Big Cities	History of Apart-heid	Relaxing on the Beach	Hiking	Adven-ture Sport	Shop-ping	Business
1	German Wanderlusters	4	4	3	3	3	2	3	2	1	2	1
2	German NSSA	4	4	4	4	3	3	2	2	1	2	1
3	French Wanderlusters	4	4	4	3	2	4	3	3	3	2	1
4	French NSSA	4	4	4	3	3	2	3	2	1	2	1
5	UK Wanderlusters	4	4	3	4	3	2	3	4	2	2	1
6	UK NSSA	4	4	4	3	2	2	3	3	1	2	1
7	US Wanderlusters	4	4	4	3	3	3	3	3	3	2	1
8	US NSSA	4	4	4	3	3	3	2	4	2	2	1
9	Chinese Wanderlusters	4	3	2	2	3	1	3	1	2	2	1
10	Chinese Upcoming Wanderlusters	4	4	3	3	3	1	4	2	1	2	1
11	Japanese Wanderlusters	4	4	4	3	0	4	0	1	0	2	1
12	Japanese NSSA	4	3	2	1	2	2	2	1	1	2	1
13	Kenya All	4	3	3	3	3	2	4	4	2	1	2
14	Nigeria All	4	2	4	3	3	0	3	2	1	0	3
15	SADC Well-to-do Leisures	4	3	3	2	3	1	4	2	1	3	3
16	SADC Shopping Brigade	4	2	2	2	4	1	2	2	1	4	3
17	SADC Young and Upcoming	2	1	4	1	4	1	2	2	1	3	3
18	Domestic Young and Upcoming	2	1	4	1	4	4	3	1	1	3	1
19	Domestic Striving Families	3	3	3	2	3	4	2	1	1	3	1
20	Domestic Well-off Homely Couples	4	4	3	4	2	3	4	3	2	1	1

Source: SAT 2006

New Domestic Segmentation 2011

Using the information from the surveys conducted, five action variables were identified. These are race, purpose of travel, age, income and family situation. LSM has been replaced by income. Using these five variables, the available market was grouped into 14 segments based on travel behaviour and preferences.

NTSS targets were used to identify the most important segments on which to focus activation efforts. From the NTSS, three metrics were identified in order to assist in creating the most appropriate segments for activation. These were growth (volume), cultural transformation (change of travel habits and activities) and ability to win. Using these as metrics, the 14 segments were reduced to 5, circled in the diagram:



Source: SAT 2012

International Segmentation

Through the segmentation of markets, a number of global segments have emerged across countries, of people who are positive and keen to visit South Africa. The diagram below depicts the latest segmentation:

SA tourism has identified key segments in its focus markets across the world...

KEY FOCUS SEGMENTS

Wanderlusters

- Wanderlusters (USA)
- Upscale Wanderlusters (USA)
- Wanderlusters (UK)
- Upscale Wanderlusters (UK)
- Wanderlusters (De)
- Wanderlusters (Fr)
- Wanderlusters (In)
- Wanderlusters (Ne)
- Emerging Wanderlusters (Aust)
- Wanderlusters (Aust.)
- Ex-Pat Wanderlusters (Ni, K)
- Organised Wanderlusters (Ch)
- Experienced Wanderlusters (Ch)
- Organised Wanderlusters (Jp)
- Experienced Wanderlusters (Jp)
- Wanderlusters (Jp)

NSSAs

Adventurous, explorative (Grown-up Wanderlusters)

NSSA Explorers

- US Adventure/Culture NSSAs
- UK NSSAs (UK)
- German NSSAs (De)
- French NSSAs (Fr)
- Dutch NSSAs (Ne)
- Ex-Pat NSSA (Ni, Ke)
- NSSAs (Ke)
- NSSAs (Japan)
- NSSAs (Aust)

Relaxation and luxury with some discovery

Pampered NSSAs

- US Relaxer NSSAs
- High End Package (Ne)
- Luxury Elderly Break (Ne)
- High Spend Package (A)
- Hyper Wealthy (Without Kids) (Ni)
- Ex-Pat Pampered NSSAs (Ni, Ke)

Family Travellers

Cacooned/Low Adventure

- Family Explorers (USA)
- Hyper Wealthy (With kids) (Ni)
- Ex-Pat Low Adventure Family Travellers (Ni, Ke)
- Young Families (In)

Explorers/Adventurous

- Family African Discoverers (De)
- French Family Explorers
- Ex-Pat Family Explorers (Ni, Ke)
- New Family Explorers (In)
- Experienced Family Explorers (In)

Positive Convertibles

- Convertible Short Haul (Ne)
- Positive Convertibles (USA)
- Positive Convertible (UK)
- Positive Convertibles (Japan)

Senior Explorers

- Senior Explorers (De)
- Senior Explorers (Fr)
- Senior Explorers (Japan)
- Empty Nesters (In)
- Senior Explorers (Aust)

Purpose Travellers

- Independent Business People (Ni)
- Traders/Importers (Ni)
- Purpose Travellers (China)
- Business Professionals (SADC)
- Private Traders (SADC)
- Taxi Traders (SADC)
- Trading Truckers (SADC)

Source: SAT 2012

The core segments which SAT will be focusing on are the NSSAs (Next Stop South Africa) and the Wanderlusters. The major differentiator between these two segments is age. The Wanderluster is a more 'youthful' segment, whereas the NSSAs are more 'mature'. However, they both know and are positive about South Africa and have a desire to travel here. They travel abroad regularly, however, they have several destination choices. The challenge is to switch them from other destinations to South Africa. Centre of gravity descriptions: "The person and situation for which the brand is always the best choice is defined in terms of their attitudes and values, NOT just demographics".

CENTRE OF GRAVITY

YOUNG SOUTH AFRICA SEEKERS

- 26 - 40 years old.
- Predominantly male (61%).
- Make decisions by themselves.
- Almost all work full-time.
- Have ±2 weeks for holiday.
- Holiday Spend: <$2 000.
- Use Internet for info and travel agents for fulfillment.
- Don't like tours. They want largely independent adventure.
- They are active explorers.
- Concerns: getting around, safety and perceived expense.

SOUTH AFRICA SEEKERS

- Well-travelled. Worldly.
- Independent.
- Travellers, not tourists.
- Travel is a state of mind for them. They are global citizens for whom travel is an essential part of their everyday lives.
- They travel to expand their knowledge and to evolve (It keeps them interesting).
- They want to engage the destination, not see it at arm's length.
- They seek out interesting and high quality experiences.
- They like to make their own decisions and maintain a sense of control over their own destiny.

MATURE SOUTH AFRICA SEEKERS

- 41 - 60 years old.
- Most married, make decisions together.
- 40% retired. 20% semi-retired.
- Travel for between 2 and 5 weeks.
- High holiday spend: between $2 000 and $5 000.
- Use travel agents for information and fulfillment (have a relationship).
- May use tours if they are flexible.
- Interested in a large variety of activities that allow them to explore.
- Demanding travellers who are constantly looking for the next amazing thing.

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 451m
Population	10.4mn (19.8% of South Africa) mid-2012 (growth rate 1.1%)
Population Density	110 people per square kilometre 2011
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 is made up of 100 cents
GDP 2012	R322.3 billion or 8.08% of South Africa's GDP
Electricity	220 Volts
Harbours	Durban, Richards Bay
Airports	King Shaka International Airport, Oribi, Richards Bay, Margate, Ulundi.
Literacy Rate	75.6% (2012)
Employment Rate ('09)	Between 66% - 77.4% (using strict and expanded definitions)

Source: TKZN, IHS, KZN Provincial Treasury

KwaZulu-Natal's World Heritage Sites

Name	iSimangaliso Wetland Park World Heritage Site
Location	North eastern coast of KwaZulu-Natal, South Africa
Date of Inscription	December 1999
Criteria	Ecological processes, natural beauty, biodiversity
Size	332 000ha, 220kms of coastline
Highest Elevation	Mt Tabor 130m on the Eastern Shores coast, Nyathikazi 159m on the northern coast, oKhombe 474m, Lebombo Mountains.
Brief description	Three major lake systems, 8 interlinking ecosystems, 250km of coastline, coral reefs, salt and fresh water marshes, coastal grasslands, forested dunes, both tarred and gravel roads.
Climate	Sub-tropical. Summer 17 - 28 ºC, Winter 11 – 25ºC, average rainfall 690mm inland, 1 200-1 300mm on the coast.
Facilities	3 000 beds in St Lucia area. In park - 8 campsite areas, 6 self-catering areas, 3 areas with catered lodges, boat launch sites, picnic sites, animal viewing hides and platforms.
Activities	Game viewing, night drives, game walks, game viewing horse rides, fishing, turtle viewing, whale watching, bird watching.
Visitor Numbers	±62 000 pa
Animal Species / Numbers	Total species: 97 terrestrial mammals, 32 marine mammals. Big 5: elephant, over 100 rhino, white and black, buffalo, lion, leopard. Other notable mammals: giraffe, zebra, wildebeest, wild dog. Notable amphibians: leatherback turtles, loggerhead turtles, plus whales, dolphins, 250 fish species. Insect species include: 196 butterfly, 52 dragonfly, 139 dung-beetle and 41 land snail species.
Bird Species / Numbers	526 bird species, including fish eagle, pelican, heron, stork, flamingo, guinea fowl, snake eagle, kingfisher, sunbird.
Other	2 173 plant species

Source: TKZN

KwaZulu-Natal's World Heritage Sites	
Name	**uKhahlamba Drakensberg Park World Heritage Site**
Location	Forms western KwaZulu-Natal border between SA and Lesotho, major watershed
Date of Inscription	November 2000
Criteria	Cultural (3) and natural (4) criteria
Size	242 813ha
Highest Elevation	3 451m
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, hang gliding, horse riding, horse trekking, river swimming, rock art viewing, picnicking.
Visitor Numbers	Annual total 2009 – ±110 000
Animal Species / Numbers	Mammals: 48 species including eland, water buck, oribi, mountain reed buck, ±1 800 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

Source: TKZN, IHS, KZN Provincial Treasury

Tourism Regions of KwaZulu-Natal

Zulu Kingdom. ***Exceptional***

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