South Africa KWAZULU-NATAL

Zulu Kingdom. ***Exceptional***

STATISTICS

OF OUR TOURISM SECTOR

2014

DESTINATIONS VISITED IN KZN

SOME USEFUL STATISTICS – 2014

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

Global Foreign Tourism Market 2013

	World	Africa	South Africa	KZN
Size	1.087bn[1]	56mn[1]	9.62mn[4]	±847 146 (±338 854*)
Growth (%)	5%[1]	6%[1]	4.7%	-5%[4]
Direct Spend (Tourism Receipts)	U$1159bn[1]	U$34.2bn[1]	R70.3bn[4] (excluding CAPEX) R73.2bn	R6.1bn[4]
Daily Spend	-	-	R870[4]	R880
Average Stay (Nights)	-	-	8.7 nights[4] (most common 2 nights)	Avg 8.5 nights[7] (6.885mn bednights in total)[4]

Source: WTO 2014 April Barometer[1], WTTC[2], SAT[4], TKZN[5], *African air and overseas departures 2013. KZN 8.6% of RSA's total of 79 889 200 bednights in 2013[7].

Global Tourism Contribution 2013

	World	Africa	South Africa	KZN
Number Directly Employed	101mn*	8.2mn*	±645 500*	±177 542***
Total Employed	266mn*	19.3mn*	±1.404mn*	±386 165***
Contribution to GDP %	9.5%*	±8.5%*	±9.5%*	±5.2%#
Total Direct Contribution to GDP (Foreign + Domestic)	US$2.2tr*	U$71.6bn*	±R103.2bn*	±R27.9bn***
Total Contribution to GDP (Foreign + Domestic)	U$6990.3bn*	U$177.7bn*	±R478.3bn*	±R39.3bn***

Source: IHS Global#, WTTC 2014*, SAT**, TKZN*** 2014, **** 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 2013 (million)

1. France	83.0	6. Turkey	36.8
2. USA	69.8	7. Germany	31.5
3. Spain	60.7	8. UK	31.2
4. China	55.7	9. Russian Federation	28.4
5. Italy	47.7	10. Thailand	26.5

(30. South Africa) Source: UNWTO 2014

The Tourism Top 10 Global Spenders 2013 (US$ billion)

1. China	128.6	6. France	42.4
2. USA	86.2	7. Canada	35.2
3. Germany	85.9	8. Australia	28.4
4. Russian Federation	53.5	9. Italy	27.0
5. UK	52.6	10. Brazil	25.1

(48. South Africa 3.4) Source: UNWTO 2014

The Top 10 Global Generators of Tourists 2013			
1. Hong Kong, China	84 414 000	6. Russian Federation	54 069 000
2. China	83 183 000	7. Canada	32 276 000
3. Germany	74 192 000	8. Italy	27 798 000
4. USA	61 569 000	9. France	24 450 000
5. UK	58 507 000	10. Netherlands	18 094 000

(South Africa 5 031 000) Source: UNWTO 2014

The South African Foreign Picture 2013	
Numbers of Foreign Tourists	9.62mn
Spend - pppd	R870 (R7 569 per trip)
Average Length of Stay	8.7 nights
Main Overseas Source Markets	UK, USA, Germany, China, France, Netherlands

Source: SAT 2014

South Africa's Top 5 Overseas (Long Haul) Tourist Markets 2013	
1. UK	442 523
2. USA	348 646
3. Germany	304 090
4. China	151 167
5. France	134 840

Source: SAT 2014

South Africa's Top 5 Average Spending Markets Per Trip (excluding Capital Expenditure)	
1. China	R21 300
2. Australia	R17 700
3. USA	R16 000
4. Angola	R13 700
5. Netherlands	R13 400

Source: SAT 2014

Purpose of Visit to South Africa

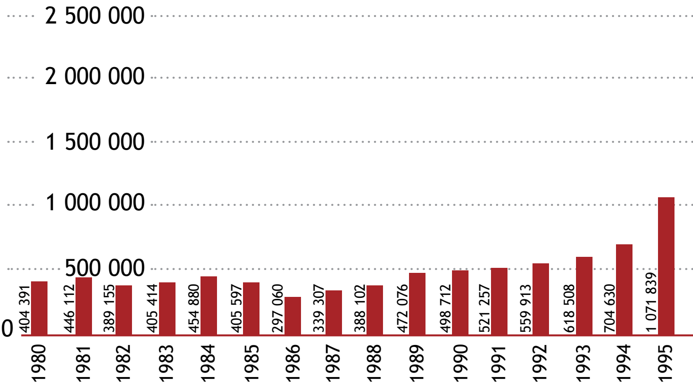
	All Foreign Tourists (2013)
Holiday	19.1%
VFR	30.4%
Shopping	22.3%
Business Travel	9.2%
Other	6.7%
Medical	4.0%
Business Tourism	8.3%

Source: SAT 2014

Foreign Tourist Activities in South Africa 2013	
Shopping	78%
Nightlife	70%
Social	47%
Visiting Natural Attractions	19%
Business	19%
Cultural, Historical, Heritage	15%
Beach	12%
Wildlife	10%
Theme Parks	12%
Casino	4%

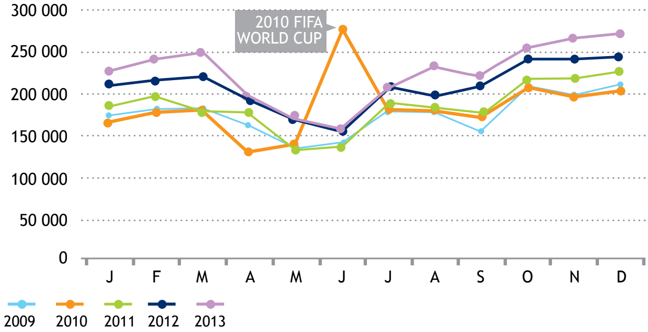
Source: SAT 2014

South Africa's Overseas (Long Haul) Visitors 1980 - 2013



Source: SAT 2014

Overseas Tourist (Inbound Long Haul) Seasonal Flow 2009-2013



Source: SAT 2014

The South African Domestic Tourism Picture 2013

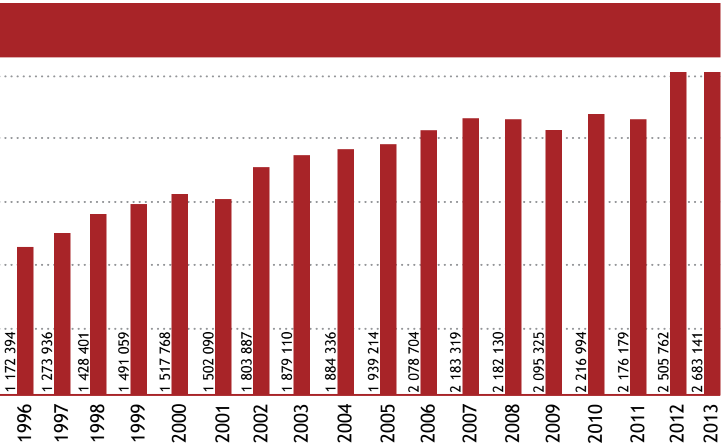
Numbers of Tourists Annually	25.2mn trips, 12mn travellers
Spend - Per Trip	±R980; R210 per day
Spend - Total Market Value	R24bn direct spend
Average Length of Stay	4.4 nights
Main Source Markets	Gauteng, KZN, Limpopo

Source: SAT 2014

Purpose of Visit

VFR	72%
Holiday	12%
Business	6%
Religious	7.4%
Medical	0.5%

Source: SAT 2014



Top 5 South African Domestic Tourism Source Markets 2013	
1. Gauteng	10.8mn
2. KwaZulu-Natal	5.4mn
3. Limpopo	2.9mn
4. Western Cape	2.4mn
5. Eastern Cape	1.4mn

Source: SAT 2014

KwaZulu-Natal - The Foreign Tourist Picture 2013	
Number of Visitors Annually	±847 146
Average Spend per Visitor	±R7 201 per trip, R880 per day
Spend - Total Market Value	R6.1 billion
Length of Stay: Average	8.5 nights
Main Overseas Source Markets	USA, UK, Germany, India, Australia

Source: SAT 2014

KwaZulu-Natal's Top 10 Foreign Tourism Source Markets 2013					
1. Swaziland	269 362	31.8%	6. Germany	42 269	5%
2. Zimbabwe	57 308	6.8%	7. India	27 267	3.2%
3. USA	55 086	6.5%	8. Australia	24 408	2.9%
4. UK	52 219	6.2%	9. France	21 709	2.6%
5. Lesotho	51 477	6%	10. Botswana	21 490	2.5%

Source: SAT 2014

KwaZulu-Natal's Top Long Haul Source Markets				
2013	2012	2011	2010	2009
1. USA	1. UK	1. UK	1. UK	1. UK
2. UK	2. USA	2. USA	2. USA	2. USA
3. Germany	3. Germany	3. Germany	3. Germany	3. France
4. India	4. India	4. France	4. France	4. Germany
5. Australia	5. Netherlands	5. Netherlands	5. Australia	5. Netherlands
6. France	6. Australia	6. Australia	6. Netherlands	6. Australia

Source: SAT 2014

Purpose of Visit to KZN – Overseas and African Air Departures 2013	
Holiday	50%
Business	24%
VFR	21%
Other	5%

Source: SAT 2014

Purpose of Visit to KZN – Land Departures 2013	
Holiday	16%
Business	14%
VFR	57%
Other	13%

Source: SAT 2014

Destinations Visited in KZN – Foreign Tourists 2013	
Durban	70.4%
Pietermaritzburg	5.3%
Zululand	5.2%
Drakensberg	2%
Elephant Coast	5.2%
North Coast	0.7%
South Coast	0%
Battlefields	1.9%

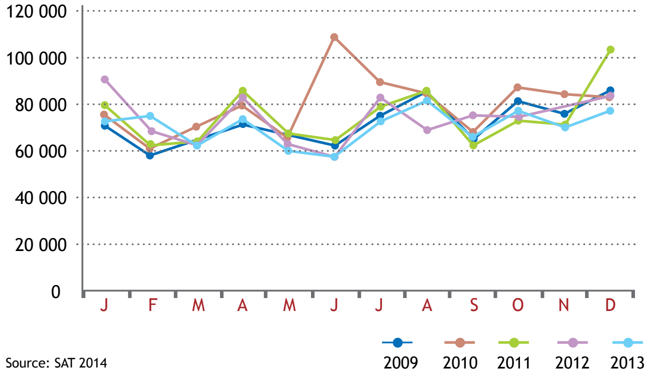
Source: SAT 2014

Some Activities Undertaken in KZN – African Land, African Air Departure and Overseas Visitors 2013

	Land	Africa Air	Rest of World
Nightlife	73.6%	63.3%	60.1%
Shopping	90.5%	69.5%	60.5%
Visiting Natural Attractions	15.4%	18.5%	58.4%
Beach	48.2%	49.6%	52.9%
Wildlife	5.5%	8.3%	39.4%
Cultural, Historical and Heritage	18.2%	20.4%	35.1%
Social	72.0%	26.5%	24.2%
Business	7.1%	36.9%	20.3%
Theme Parks	11.9%	20.8%	36.4%
Adventure	1.3%	5.3%	16.0%
Visited a Casino	10.0%	7.8%	5.9%
Sporting - Spectator	1.9%	8.5%	1.6%
Education	2.8%	8.1%	3.6%
Sporting - Competed	1.0%-	1.4%	0.7%
Hunting	0.1%	0.1%	1.2%
Medical	1.0%	0.5%	0.2%
Health	1.7%	3.9%	4.3%
Trading	2.4%	0.8%	1.3%

Source: SAT 2014

Monthly Overseas and African Air Arrivals in KZN – 2009-2013



Source: SAT 2014

KZN – The Domestic Tourist Picture 2013

Number of Visitors Annually	±7.1mn trips*
Average Spend Per Trip	±R726/R177 per day
Spend – Total Direct Value	±R6.6bn
Average Length of Stay	4.1 nights (8.22 – TKZN)
Main Source Markets	KwaZulu-Natal, Gauteng

Source: SAT 2014

KZN – Top 5 Domestic Source Markets 2013

1. KwaZulu-Natal
2. Gauteng
3. Free State
4. Eastern Cape
5. Western Cape

Source: TKZN 2014

KZN – Top Source Markets for Holiday Makers 2013

1. KwaZulu-Natal
2. Eastern Cape
3. Western Cape
4. Gauteng
5. Free State

Source: TKZN 2014

Purpose of Visit to KZN – Domestic Visitors 2013

VFR	53.3%
Holiday/Leisure	32.6%
Business	10%
Other	4.1%

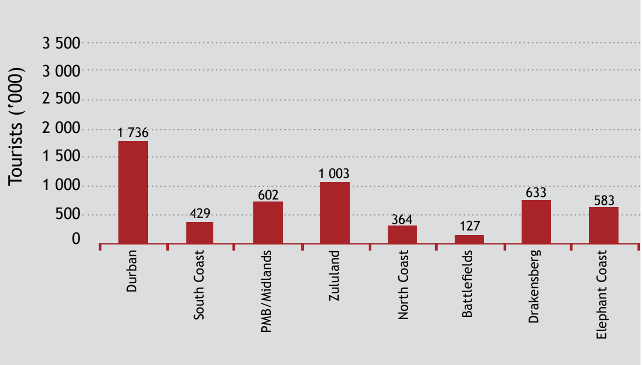
Source: TKZN 2014

Activities Undertaken in KZN – Domestic Visitors 2013

Activity	%
Go to the beach	83.1
Go to a live show, theatre or concert	26.3
Watch a live sports event	33.3
Visit a museum, art gallery or historical building	29.8
Visit a nature or wildlife or game reserve	24.2
Take part in a sports event	28.9
Take part in any water sport	18.9
Visit an arts or craft outlet	15.8
Visit an African township or cultural village on a tour	20.9
Food and wine fair	16.4
Go hiking or mountain-climbing	16.5
Bird-watching	8.2
Art and crafts festival	10.7
Attend a conference, workshop or training session	19
Visit a health spa	11.4
See bushman paintings	7.7
Fly-fishing	7.8
Horse riding	6.8
Go backpack/hostel travelling	9.6
Mountain biking or other cycling	7.9
Tour of the battlefields	5.6

Source: SAT 2014

Destinations Visited in KZN – Domestic Tourists 2013



Average Trips in 2013

Durban	2.41
Pietermaritzburg/Midlands	2.34
South Coast	2.34
North Coast	1.98
Zululand	2.14
Drakensberg	2.03
Elephant Coast	2.16
Battlefields	1.77

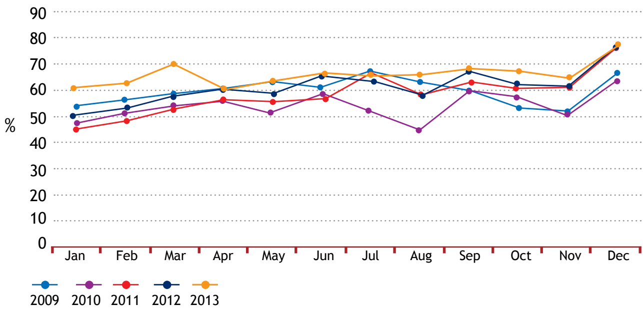
Source: TKZN 2014

Domestic Trips to Destinations in KZN 2013

Durban	32%
Pietermaritzburg	11%
Zululand	18%
Drakensberg	12%
Elephant Coast	11%
North Coast	7%
South Coast	8%
Battlefields	2%

Source: TKZN 2014

Hotel Room Occupancy % Graph KZN 2009-2013



Source: FEDHASA (KZN), STR Global, 2014

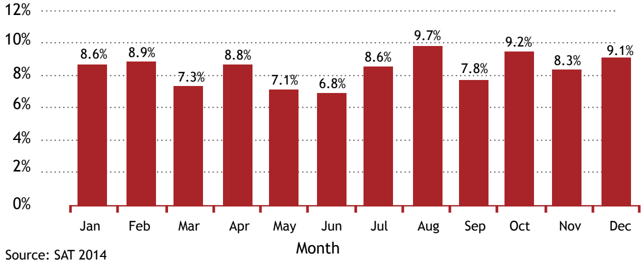
KwaZulu-Natal Supply Statistics 2013

Hotels: 268
Guest Houses: 379
Lodges: 210
Bed and Breakfasts: 698
Caravan and Camp Sites: 101

Self-Catering: 815
Youth Hostels/Backpackers: 37
Conference Venues: 298
Tourist Guides: 1 080
Tour Operators: 457

Source: TKZN July 2014

KZN Domestic Seasonal Flow 2013



Source: SAT 2014

Relative Market Potential
Input - Key Consumer Segment Profiles

0 1 2 3 4

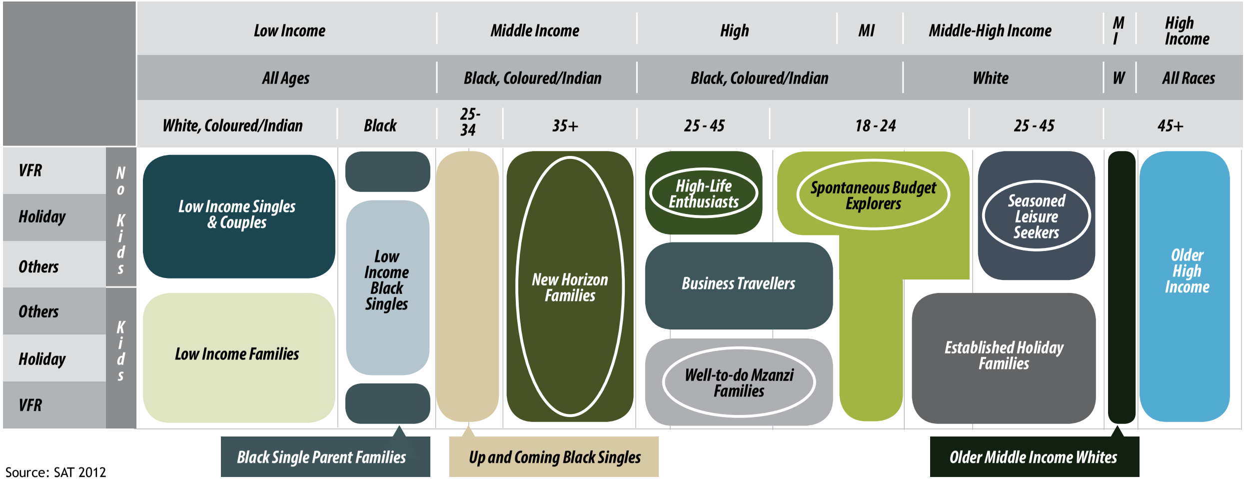
	Key Consumer Segments	Natural Beauty	Viewing Wildlife	Exploring the Culture	Visiting Mountains	Visiting Big Cities	History of Apartheid	Relaxing on the Beach	Hiking	Adventure Sport	Shopping	Business
1	German Wanderlusters	4	4	3	3	3	2	3	2	1	2	1
2	German NSSA	4	4	4	4	3	3	2	2	1	2	1
3	French Wanderlusters	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 2013

Using the information from the surveys conducted, five 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 upon 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 a 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's International and Domestic Segmentation 2014-2019

MARKET	GEOGRAPHIC SCOPE			
Domestic	• KwaZulu-Natal • Gauteng • Western Cape • Eastern Cape • Free State			
SADC **Rest of Africa**	• Swaziland • Lesotho • Botswana • Mozambique • Zambia • Zimbabwe • Kenya • Nigeria • Angola			
EUROPE **AMERICAS** **ASIA**	**CORE**	**OPPORTUNITY**	**INVESTMENTS**	**STRATEGIC HUB**
	• United Kingdom • USA • Germany	• France • Netherlands • Australia	• India • China • Brazil • Sweden • Eastern Europe (Russia)	• Middle East (GCC countries)

Source: TKZN 2014

TARGET SEGMENTS	CORE EXPERIENCES
• New Horizon families • High-life enthusiasts • Well-to-do Mzansi families • Spontaneous budget explorers • Seasoned leisure-seekers	• Beaches • Natural beauty • Nightlife • Shopping • Heritage • Culture
• Business professionals • Traders	• Shopping • Big cities • Beaches (not coastal markets) • Wildlife • Heritage
• NSSA, Wanderlusters • Family explorers • New beach-lovers	• Natural beauty • Wildlife • Culture • Visiting mountains • Beach • Adventure (USA Wanderluster)

KZN Provincial Information	
Area	94 361 km^2 (7.7% of South Africa)
Coastline	560kms
Climate	Sub-tropical. Summer 17-28ºC, Winter 11-25ºC, Durban average rainfall - 1 009mm
Highest Elevation	3 451m (Mafadi in the Drakensberg)
Population	10.5mn (19.7% of South Africa) mid-2013 (growth rate 1.3%)
Population Density	111 people per square kilometre 2012
Capital	Pietermaritzburg
Languages	Mainly Zulu and English
Holidays	1 January, 21 March, 3 April, 6 April, 27 April, 1 May, 16 June, 9 August, 10 August, 24 September, 16 December, 25 December, 26 December.
Time Zone	GMT +2
Currency	The Rand is made up of 100 cents
GDP 2013	R537.2 billion or 15.8% 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	Between 63% - 74% (2013, using strict and expanded definitions)

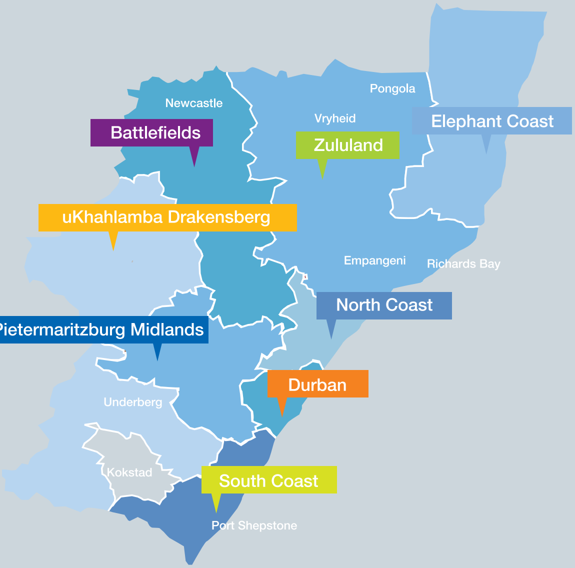
Source: TKZN, IHS, STATSSA, KZN Provincial Treasury, *Quantec

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 - 28ºC, 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 South Africa 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: 22ºC, winter: 5ºC, average rainfall 900mm, frequent 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



TOURISM REGIONS OF KWAZULU-NATAL

Zulu Kingdom. ***Exceptional***

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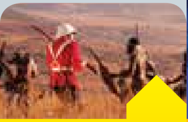
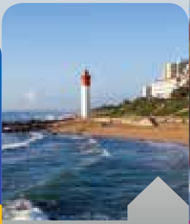


3.3%
Battlefields

8.1%
South Coast



8.4%
North Coast

13.6%
Pietermaritzburg

DESTINATIONS VISITED IN KZN