

KwaZulu-Natal Visitor Book Project Report

Tourism KwaZulu-Natal

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Executive Summary

Tourism KwaZulu-Natal (TKZN) has devised a number of different methods through which to collect information about tourists to the province. These methods are combined in order to provide as complete a picture as possible of what such visitors do, what they don't do, what they enjoy or don't enjoy, where they come from, and upon what they spend their money.

One of the methods used to collect tourism information is that of our by now well-known Visitor Books. TKZN has developed two Visitor Books – the first is a standard one for distribution to all publicity associations, information offices, and a range of tourism amenities and facilities throughout the province. These include cultural villages, the aquarium, bird parks, museums, art galleries and the like.

A second Visitor Book was designed specifically to collect information from Youth or Backpacker Hostels. The World Tourism Organization (WTO) has stated that the backpacker market is one of the fastest growing segments of the accommodation sector and yet very little is known about it to date. TKZN has set out to improve this situation, at least as far as this province is concerned.

The information from the Visitor Books is then returned by users to TKZN on a regular basis, with duplicates being retained by each participating organization for their own records. The information is captured onto computer by TKZN and reports are produced from the collation of information on a regular basis. The reports consist of a section on all respondents for the standard Visitor Book, a section dealing only with visitors to museums and art galleries, regional reports on visitor profiles for each tourism region in the province, and one dealing only with Backpacker Hostel information. These reports are distributed to all the participants.

It is very interesting that the Visitor Book results mirror the findings of the annual TKZN consumer surveys extremely closely. Foreign visitors to amenities using visitor books, for example, originate mainly from the UK, Germany, Holland and France. South Africans who make use of such facilities are mostly from within the province of KwaZulu-Natal or from Gauteng. Visitors to museums and art galleries mainly make use of these facilities during the June and July winter period while overall, visitors to all the facilities with visitor books use them during June, January, March and December showing a more even spread through the year. This is particularly true with users of Backpacker facilities.

An interesting development is that TKZN is now being contacted by people who wish to make use of these visitors' books and to take part in the project and so visitors books are now distributed to almost 160 facilities throughout the province and to almost 40 KZN backpacker hostels, the numbers increasing constantly.

1. Introduction

An understanding of the interest in, and numbers of people who go to, tourist attractions throughout KwaZulu-Natal is fundamental to all planning, marketing and promotion campaigns, service and facility improvement and tourism development generally. Tourism KwaZulu-Natal has run the visitor book project for just over five years. This report is a collation of all the returned data from the start of the project in January 1998 until the end of February 2004. It should be read in conjunction with the previous reports in order to identify trends in visitor patterns to the participating organisations and amenities. Note should also be taken of new participants in the projects.

When considering the tables and graphs which follow, it must be kept in mind that over five full years of data are used and that, for example, a month such as 'December' represents all the 'Decembers' during that time period. It should also be borne in mind that the data used consist only of those pertaining to people who filled in visitors' books, to the information which was provided and which was not necessarily complete in all cases, and to the establishments which sent in visitor book pages to TKZN for data capturing. A list of participating establishments for each of the two visitor books is appended to this report. It should be noted that although a great deal of information has been returned, data capturing takes time. This means that some establishments have not yet had their data captured although they may have sent in visitor book data pages some time ago. Likewise, some of the establishments which participated initially have become defunct but their valuable data has been retained.

2. Visitor Book Types

a) Standard Visitor Books

There are presently two parallel visitor book projects running. The first type, which has been running the longest – since the beginning of 1998, is the standard Visitor Book which has been provided to publicity associations, museums, art galleries and a variety of other tourist attractions such as Sea World (now part of uShaka Marine World), bird parks, cultural villages and the like throughout the province.

b) Hostel Visitor Books

The second type of Visitor Book is one developed especially for backpacker or youth hostels. This type has been in circulation for almost four years and thus has returned somewhat less data than the standard visitor book.

3. Standard Visitor Books – Respondents

a) Total Analyses

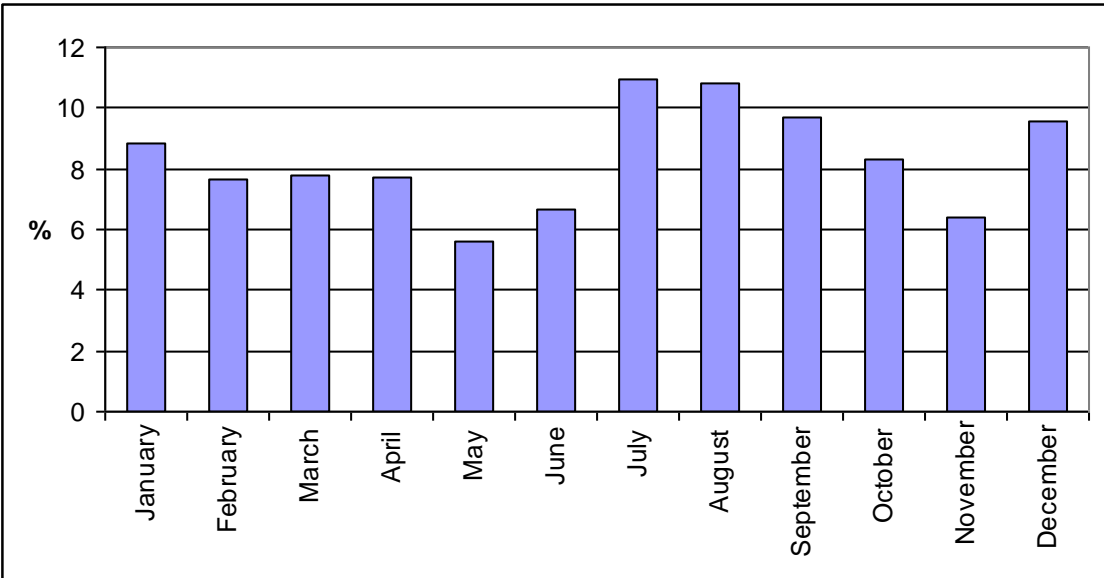
The table below provides an indication as to how many respondents were captured from **all** of the returned forms from visitor books provided to Publicity Associations, museums, art

galleries, bird parks, the aquarium, the snake park, mini town and the like. The total numbers of visitors are provided as well as the percentages per month as a total of the entire period. There are presently 147 organizations throughout the province taking part in this project.

**Table 1: Total Respondents by Month – Standard Visitor Book
January 1998 - September 2004**

| Month | Count | % |
|--------------|---------------|---------------|
| January | 10100 | 8.84 |
| February | 8717 | 7.63 |
| March | 8854 | 7.75 |
| April | 8804 | 7.71 |
| May | 6425 | 5.62 |
| June | 7648 | 6.69 |
| July | 12526 | 10.96 |
| August | 12379 | 10.84 |
| September | 11076 | 9.69 |
| October | 9521 | 8.33 |
| November | 7302 | 6.39 |
| December | 10896 | 9.54 |
| Total | 114248 | 100.00 |

**Figure 1: Total Respondents by Month (Standard Visitor Book)
Jan 1998 – September 2004**



As the table and graph above indicate, the periods during which most people visited the Publicity Associations, museums and other amenities were once again shown to be during the winter and spring periods, times which largely correspond to local school holidays as well as to the latter part of summer holiday periods in the northern hemisphere. July surpassed August as the most popular month for enjoying these sorts of tourism and recreational amenities, with a second lesser peak in December/January. The May, June and November periods were the least popular, the smallest visitor numbers again occurring during May.

Obviously the school holiday periods were important for local and domestic visitors to such amenities, although school groups also visit museums, art galleries and other tourism attractions during the term periods. Other causes of increases in any particular month are the events which occur during that month. For example, with September celebrated as tourism month, it is not unexpected that there should be a higher number of visitors to tourism amenities in the province in that month.

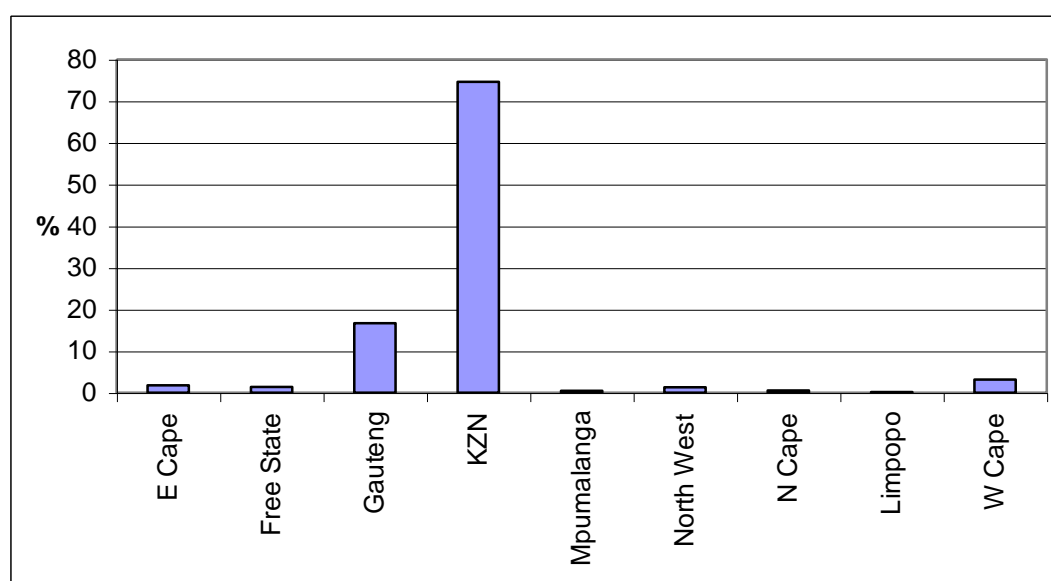
An interesting additional statistic is that obtained from the toll plazas on the route between the most populous area of the country, Gauteng, and KZN. In December 2002, some 536 503 vehicles passed through the Marianhill plaza on the way to Durban, an increase of 5% over the previous year. As each vehicle would be most unlikely to be carrying only one person, this could easily equate to well over a million visitors to the Durban area in December alone arriving via the N3.

As far as foreign visitors go though, the period from February until April is very popular and accounts for many of the foreign visitors to participating amenities. The winter period of July and August, though, was the most popular time to visit these facilities.

**Table 2: Total Respondents Province – Standard Visitor Book
January 1998 – September 2004**

| Province in S A | Total | % |
|-----------------|--------------|---------------|
| E Cape | 1154 | 1.75 |
| Free State | 889 | 1.35 |
| Gauteng | 10977 | 16.68 |
| KZN | 49071 | 74.59 |
| Mpumalanga | 303 | 0.46 |
| North West | 875 | 1.33 |
| N Cape | 341 | 0.52 |
| Limpopo | 98 | 0.15 |
| W Cape | 2082 | 3.16 |
| Total | 65790 | 100.00 |

Figure 2: Respondents by Province



Once again, the vast majority of respondents, almost three-quarters, who made use of the facilities at which Visitor Books were distributed, indicated that they were from within the province of KwaZulu-Natal. This was followed once again by those from Gauteng, traditionally KwaZulu-Natal's second most important domestic market, and which accounted for almost 17% of the total number of people who filled in Visitor Book forms.

The domestic consumer surveys reflects the findings of the Visitors Book Survey closely in that most of the domestic respondents were from Gauteng and KwaZulu-Natal – 42% from Gauteng and 36% from KwaZulu-Natal in the Consumer Survey for 2002, followed by the Eastern Cape.

Visitors to provincial facilities also originated from outside the borders of South Africa. The following table provides a breakdown of the origins of the foreign visitors, followed by a graph of the most important source countries for visitors to provincial facilities.

Table 3: Foreign Visitors by Country

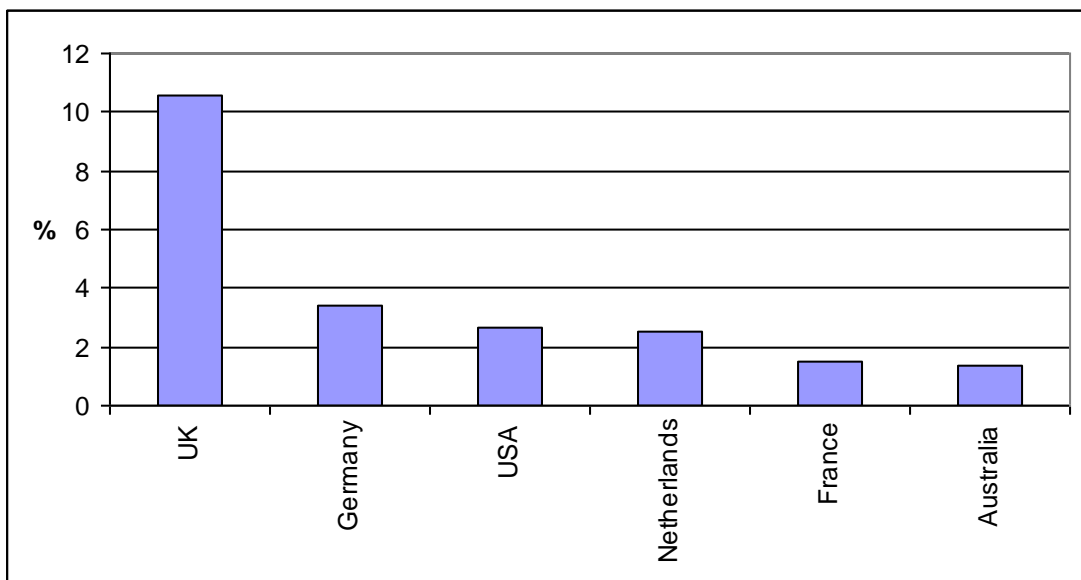
| Country | Count | % |
|-----------|-------|------|
| Algeria | 6 | 0.01 |
| Angola | 33 | 0.03 |
| Antigua | 9 | 0.01 |
| Argentina | 181 | 0.17 |
| Australia | 1425 | 1.35 |
| Austria | 244 | 0.23 |
| Bahamas | 20 | 0.02 |
| Belgium | 788 | 0.75 |
| Bermuda | 5 | 0.00 |

| | | |
|-----------------|------|------|
| Bolivia | 8 | 0.01 |
| Botswana | 184 | 0.17 |
| Brazil | 89 | 0.08 |
| Bulgaria | 8 | 0.01 |
| Burundi | 3 | 0.00 |
| Cameroon | 24 | 0.02 |
| Canada | 739 | 0.70 |
| Cayman Islands | 2 | 0.00 |
| Channel Islands | 5 | 0.00 |
| Chile | 20 | 0.02 |
| China | 68 | 0.06 |
| Colombia | 16 | 0.02 |
| Congo | 15 | 0.01 |
| Costa Rica | 3 | 0.00 |
| Croatia | 18 | 0.02 |
| Cuba | 3 | 0.00 |
| Cyprus | 15 | 0.01 |
| Czech Republic | 102 | 0.10 |
| Denmark | 236 | 0.22 |
| Djibouti | 2 | 0.00 |
| Dominican Rep | 2 | 0.00 |
| Ecuador | 2 | 0.00 |
| Egypt | 14 | 0.01 |
| Eston | 3 | 0.00 |
| Ethiopia | 12 | 0.01 |
| Finland | 101 | 0.10 |
| France | 1547 | 1.47 |
| Gabon | 20 | 0.02 |
| Gambia | 1 | 0.00 |
| Germany | 3589 | 3.41 |
| Ghana | 22 | 0.02 |
| Greece | 35 | 0.03 |
| Greenland | 1 | 0.00 |
| Guatemala | 2 | 0.00 |
| Honduras | 7 | 0.01 |
| Hungary | 81 | 0.08 |
| Iceland | 14 | 0.01 |
| India | 137 | 0.13 |
| Indonesia | 5 | 0.00 |
| Iran | 10 | 0.01 |
| Ireland | 544 | 0.52 |
| Israel | 154 | 0.15 |
| Italy | 536 | 0.51 |
| Ivory Coast | 4 | 0.00 |
| Jamaica | 16 | 0.02 |
| Japan | 106 | 0.10 |
| Kenya | 138 | 0.13 |
| Korea | 28 | 0.03 |
| Kuwait | 11 | 0.01 |

| | | |
|--------------|-------|-------|
| Lebanon | 5 | 0.00 |
| Lesotho | 102 | 0.10 |
| Libya | 3 | 0.00 |
| Lichtenburg | 6 | 0.01 |
| Lithuania | 1 | 0.00 |
| Luxembourg | 3 | 0.00 |
| Madagascar | 1 | 0.00 |
| Malawi | 78 | 0.07 |
| Malaysia | 44 | 0.04 |
| Mauritius | 83 | 0.08 |
| Mexico | 24 | 0.02 |
| Mozambique | 133 | 0.13 |
| Namibia | 130 | 0.12 |
| Nepal | 13 | 0.01 |
| Netherlands | 2655 | 2.52 |
| New Guinea | 3 | 0.00 |
| New Zealand | 365 | 0.35 |
| Nigeria | 31 | 0.03 |
| Norway | 369 | 0.35 |
| Oman | 4 | 0.00 |
| Pakistan | 11 | 0.01 |
| Palestine | 2 | 0.00 |
| Paraguay | 2 | 0.00 |
| Peru | 6 | 0.01 |
| Philippines | 14 | 0.01 |
| Poland | 72 | 0.07 |
| Portugal | 58 | 0.06 |
| Puerto Rico | 2 | 0.00 |
| Reunion | 198 | 0.19 |
| Romania | 12 | 0.01 |
| RSA | 72430 | 68.80 |
| Russia | 68 | 0.06 |
| Rwanda | 6 | 0.01 |
| Saudi Arabia | 72 | 0.07 |
| Scotland | 670 | 0.64 |
| Senegal | 10 | 0.01 |
| Seychelles | 3 | 0.00 |
| Singapore | 29 | 0.03 |
| Slovakia | 22 | 0.02 |
| Slovenia | 12 | 0.01 |
| Somalia | 3 | 0.00 |
| Spain | 212 | 0.20 |
| Sri Lanka | 13 | 0.01 |
| Sudan | 2 | 0.00 |
| Swaziland | 193 | 0.18 |
| Sweden | 311 | 0.30 |
| Switzerland | 423 | 0.40 |
| Taiwan | 20 | 0.02 |
| Tanzania | 36 | 0.03 |
| Thailand | 40 | 0.04 |

| | | |
|----------------|---------------|---------------|
| Trinidad | 1 | 0.00 |
| Tunisia | 1 | 0.00 |
| Turkey | 30 | 0.03 |
| UAE | 90 | 0.09 |
| Uganda | 41 | 0.04 |
| UK | 11098 | 10.54 |
| Ukraine | 5 | 0.00 |
| Uruguay | 22 | 0.02 |
| USA | 2781 | 2.64 |
| Venezuela | 13 | 0.01 |
| Vietnam | 6 | 0.01 |
| Virgin Islands | 1 | 0.00 |
| Yugoslavia | 5 | 0.00 |
| Zambia | 222 | 0.21 |
| Zimbabwe | 543 | 0.52 |
| Total | 105277 | 100.00 |

Figure 3: Most Important Foreign Home Countries



Details for the figure above are obtained from Table 3.

Once again, although respondents came from a very wide variety of countries, there were only a few which stood out as main source areas for visitors to KwaZulu-Natal amenities. The UK, Germany and the USA remained in the top positions yet again, followed again by the Netherlands. France and Australia each continued to contribute less than 2% of the total number of visitors who visited KZN facilities.

The SATourism Foreign Consumer survey for 2003 indicated that the greatest number of foreign visitors to KwaZulu-Natal are from the UK, Germany the USA and Canada, as well

as France continued to follow the findings of the Visitor Book survey. Very few changes appear to have occurred in terms of KZN's main overseas source markets over the past several years, with this remaining a very stable situation.

Table 4: Length of Stay - Nights

| Day Visit / No. of Nights | Total | % |
|---------------------------|--------------|---------------|
| Day Visit | 39414 | 55.39 |
| 1 | 13317 | 18.71 |
| 2 | 4928 | 6.93 |
| 3 | 2939 | 4.13 |
| 4 | 2152 | 3.02 |
| 5 | 1611 | 2.26 |
| 6 | 683 | 0.96 |
| 7 | 1975 | 2.78 |
| 8 -14 | 2524 | 3.55 |
| 15+ | 1617 | 2.27 |
| Total | 71160 | 100.00 |

Just over half of the to Publicity Associations, museums, or other amenities and who filled in visitor book information, were just in the area for a day visit. The rest spent time there, anywhere from a night to well over two weeks. The large number of people recorded as 'unspecified' (almost 38% of the total captured) were probably day visitors, and if this total is added to those staying for '0' nights, or specifically day visitors, these accounted just over 72%, similar to the results of the previous survey. This thus constitutes almost three quarters of the total number of visitors to such amenities.

The 2003 SATourism survey shows that most South African visitors stayed for an average of 4.4 nights on their trips, an decrease from the 8 nights of the previous survey, and most foreign visitors stayed for 6 nights in KZN, the same as in the previous survey. The average length of stay for 2003 overall though, for foreign tourists, was an increased 13 nights in the province. Obviously the longer visitors stay in the province, the greater the possibilities that they will visit more of the amenities and facilities available.

Table 5: Respondents by Communication Influence

| Media | Total Of ID | % |
|------------------------|-------------|-------|
| Advertisements | 2435 | 2.87 |
| Brochure/ Travel Guide | 23840 | 28.15 |
| Fax on Demand | 22 | 0.03 |
| History Books | 3752 | 4.43 |
| Information Sign | 2363 | 2.79 |
| Other | 3362 | 3.97 |
| Print Ad | 51 | 0.06 |
| Radio Advertisement | 81 | 0.10 |

| | | |
|----------------------------|--------------|---------------|
| Road Sign | 1941 | 2.29 |
| Tourism Information Office | 4436 | 5.24 |
| TV Advertisement | 101 | 0.12 |
| Web Site | 670 | 0.79 |
| Word of Mouth | 41643 | 49.17 |
| Total | 84697 | 100.00 |

It should be noted that approximately one third of the respondents had not filled in the information regarding the media which affected their decision to visit a particular amenity or facility. Nevertheless, of those who did fill in the information, **word-of-mouth** communication was yet again by far the most important medium influencing decisions to visit through making people aware of the facilities available. Such communications accounted, in this report again, for almost 50% of the total. Brochures and travel guides were shown to be increasingly important. They were the second most important method of influence accounting for almost 30% of the respondents. The importance of brochures, travel guides and other print media thus is shown to be continually increasing.

This was followed by other varieties of media advertising. These findings provide an indication that the marketing initiatives are having a positive effect on visitor behaviour, particularly with regards to the popularity of the annual TKZN Travel Guide. There has also been a slow but continued increase in the number of people influenced by web information, the TKZN web site still falling in the top 1% of all existing web sites worldwide!

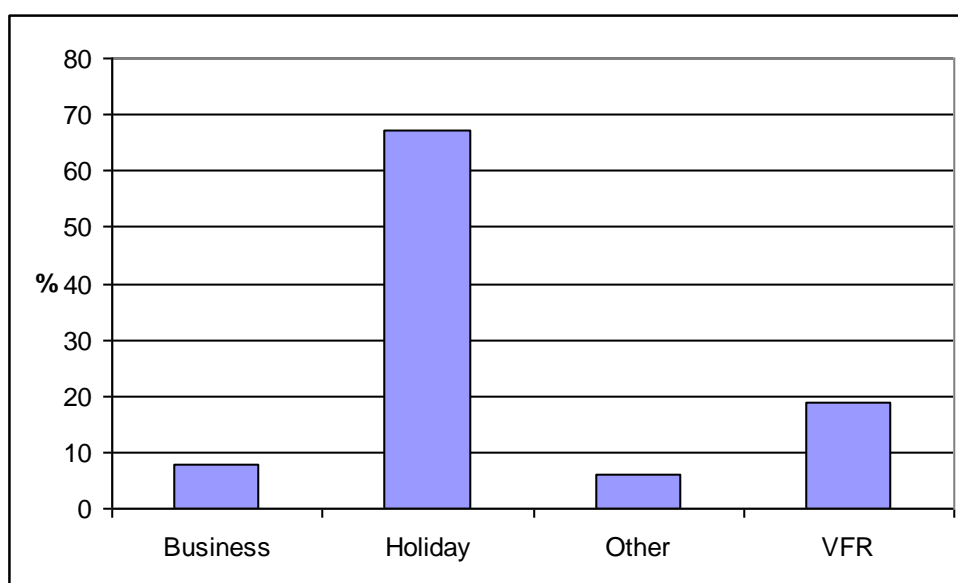
The Domestic Consumer survey further underlines the importance of word-of-mouth communication as influencing the decision to visit the province. It accounted for just over 78% of the domestic respondents' decisions for the whole of 2002, up to **83% in 2003**. The media also had considerable and increased influence. The media showed stronger influence on those visitors who were from LSM groups 1-6 (62%), while respondents from LSM groups 7 and 8 were more strongly influenced by word-of-mouth communication. VFR visitors were also influenced more by word-of-mouth communication than any other factor. Holiday visitors were also strongly influenced by media communications.

In so far as the foreign visitors were concerned, word-of-mouth communication was also the most important factor accounting for 51% of the respondents in 2002. Other media such as brochures, leaflets and the internet accounted for an increased 17% amongst foreign visitors. It must be stressed very strongly that any planning or marketing campaigns must take these findings into account if such efforts are to be successful.

Table 6: Respondents by Purpose of Visit

| Purpose | Feb '01 | % | Sept '01 | % | Nov '01 | % | Mar '02 | % | July '02 | % | Mar '04 | % | Sept '04 | % |
|--------------|-------------|------|--------------|------|--------------|------|--------------|------|--------------|------|--------------|------|--------------|-------|
| Business | 853 | 11.5 | 1417 | 11.8 | 2952 | 9.8 | 4107 | 9.2 | 4561 | 8.3 | 7649 | 8.0 | 7778 | 7.87 |
| Holiday | 5389 | 72.9 | 8672 | 72.0 | 20348 | 67.7 | 29684 | 66.5 | 34576 | 63.2 | 64155 | 67.5 | 66498 | 67.24 |
| Other | 634 | 8.6 | 868 | 7.2 | 4615 | 15.4 | 5514 | 12.3 | 5695 | 10.4 | 5964 | 6.3 | 5967 | 6.03 |
| VFR | 516 | 7.0 | 1100 | 9.1 | 2123 | 7.1 | 5350 | 12.0 | 9848 | 18.0 | 17340 | 18.2 | 18648 | 18.86 |
| Total | 7392 | | 12057 | | 30038 | | 44657 | | 54682 | | 95112 | | 98891 | |

Figure 6: Respondents by Purpose of Visit – September 2004



Once again, as expected, the vast majority of people who filled in visitor books were people on holiday, and they accounted for more than two-thirds of the respondents. Business visitors seem to be exhibiting a decreasing trend through time, as can be seen in the table above, perhaps evidence of the 'head offices in Gauteng' syndrome!

It is very interesting to look at the breakdown of visitors to KZN according to the consumer surveys. The Domestic Survey 2002 indicates that a large majority of visitors came to the province to visit friends and relatives (VFR), accounting for 51% of the respondents' reasons for visiting, a slight increase from the 49% of the previous reporting period. This is a rather different finding to that of the Visitor Book survey as indicated above.

However, if the domestic visitors are broken down according to LSM groups, 66% of the visitors in the lower LSM groups came to the province for VFR purposes (slight increase from the 63% of the previous report period), and only 27% of those in LSM 7 and 8 did so. The largest number of LSM 7 and 8 visitors came to KZN for a holiday (63%), suggesting that those who visited the amenities or facilities making use of Visitor Books were possibly in the upper LSM categories.

The Foreign Visitor survey shows a rather different picture with around 68% of the visitors to KZN here for a holiday and only around 9% here for VFR purposes, according to S A Tourism figures for 2002. The major changes then have been amongst the domestic market rather than amongst the foreign market.

The visitor book information in this report provides further support to the information provided by the KZN consumer surveys and the information obtained by S A Tourism. Furthermore, information provided by visitor books included home and email addresses of many of the respondents and this could be used for direct marketing, for advertising and for promotional campaigns, as well as for future planning.

b) Analyses - Museums and Art Galleries

It is interesting to investigate the differences between the findings related to all facilities which made use of visitor books, and the findings specifically related to museums and art galleries which used them. This report provides the ninth overview of such information up to September 2004.

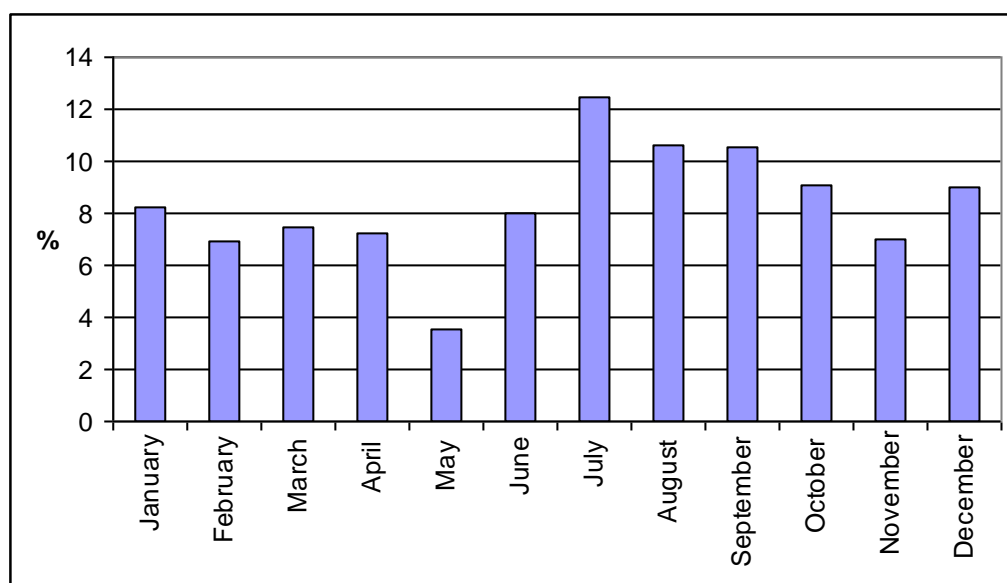
The TKZN Tourism Consumer Surveys provide even more information about the visitors to art galleries. According to the data collected in 2002, it would appear that about 28% of all domestic visitors to KZN go to a museum or an art gallery during their stay, a substantial increase over the findings of the previous survey period. What is most interesting is that the respondents were also asked what activities they would like to (but had not yet) participate in. Between 50-60% of the respondents in the previous survey period replied that they would like to visit a museum or art gallery indicating an enormous potential to increase visitorship to these institutions. The most recent results provide an indication of the success of educational campaigns and marketing initiatives in encouraging visitors to fulfill these wishes.

Foreign tourists, on the other hand, were far more likely to visit a museum or art gallery while in the province. An increased 36% (up from 19%) of foreign visitors to KZN went to an art gallery or museum. Some 55% would like to go to such a facility, even though they had not on their most recent KZN visit, indicating, once again, the enormous potential to increase foreign visitorship to these amenities.

**Table 7: Monthly Respondents to Museums and Art Galleries
January 1998 - September 2004**

| Month | Count | % |
|--------------|--------------|---------------|
| January | 1098 | 8.20 |
| February | 927 | 6.92 |
| March | 995 | 7.43 |
| April | 966 | 7.21 |
| May | 470 | 3.51 |
| June | 1071 | 7.99 |
| July | 1675 | 12.50 |
| August | 1424 | 10.63 |
| September | 1414 | 10.56 |
| October | 1215 | 9.07 |
| November | 939 | 7.01 |
| December | 1202 | 8.97 |
| Total | 13396 | 100.00 |

**Figure 7: Monthly Respondents to Museums and Art Galleries
January 1998 - September 2004**



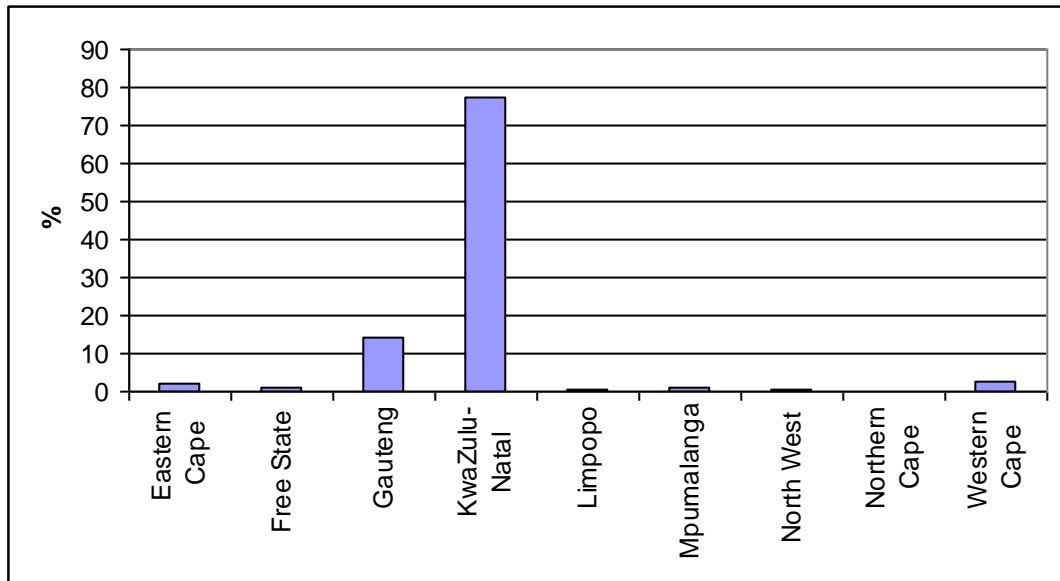
Specific details for the figure above are found in the previous table.

Once again the winter months, which include the second longest school holidays of the year, and the months of autumn proved popular to those who visited museums and art galleries throughout the province. The early and mid-summer months of October to December were also popular. This is a somewhat different visitor behaviour profile than that for publicity associations and amenities as a whole, as is shown in the first two tables of this report.

Table 8: Museum and Art Gallery Respondents by Province of Residence

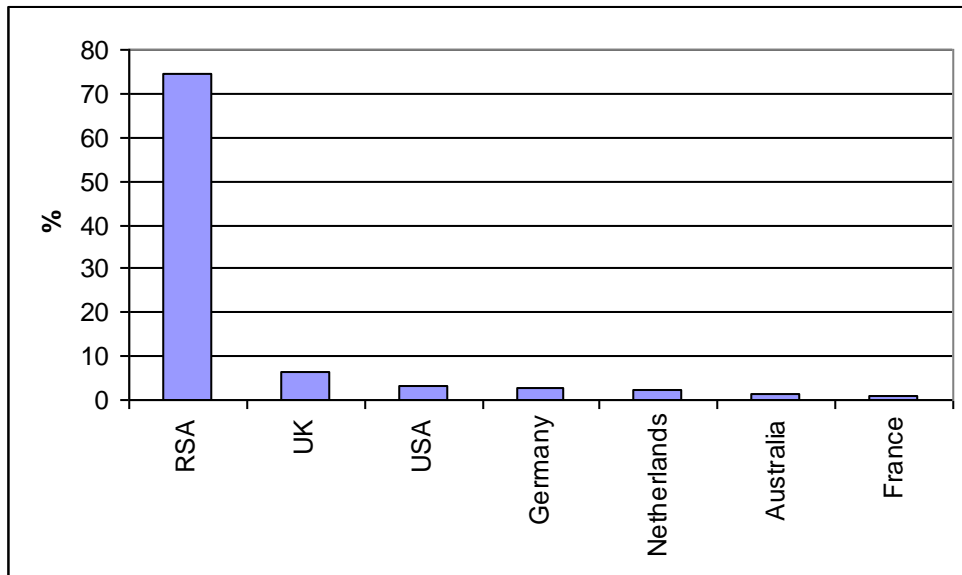
| Province | Count | % |
|---------------|-------------|---------------|
| Eastern Cape | 172 | 2.14 |
| Free State | 94 | 1.17 |
| Gauteng | 1129 | 14.07 |
| KwaZulu-Natal | 6200 | 77.29 |
| Limpopo | 55 | 0.69 |
| Mpumalanga | 88 | 1.10 |
| North West | 35 | 0.44 |
| Northern Cape | 21 | 0.26 |
| Western Cape | 228 | 2.84 |
| Total | 8022 | 100.00 |

Figure 8: Museum and Art Gallery Respondents by Province of Residence



As expected the majority of people who filled out visitors book entries in museums and art galleries in KZN were from within the province, and most of the rest of the visitors were from Gauteng. Together these visitors accounted for over 90% of the total. This mirrored the findings for respondents for visitor's books from all amenities.

Figure 9: Museum and Art Gallery Respondents by Country of Origin



As expected, other than those respondents who were from South Africa, people who filled out visitor book entries in museums and art galleries were mainly from the UK, USA and

Germany. This largely mirrors the findings both from the entire visitor's book survey results and those TKZN's consumer survey.

An interesting finding from the consumer surveys was that while only about 28% of domestic visitors to KZN visited art galleries or museums, some 36% of foreign visitors did so. Most of these were from the UK, were here for a holiday and were over 50 years of age.

Table 10: Museum and Art Gallery Respondents by Communication Influence

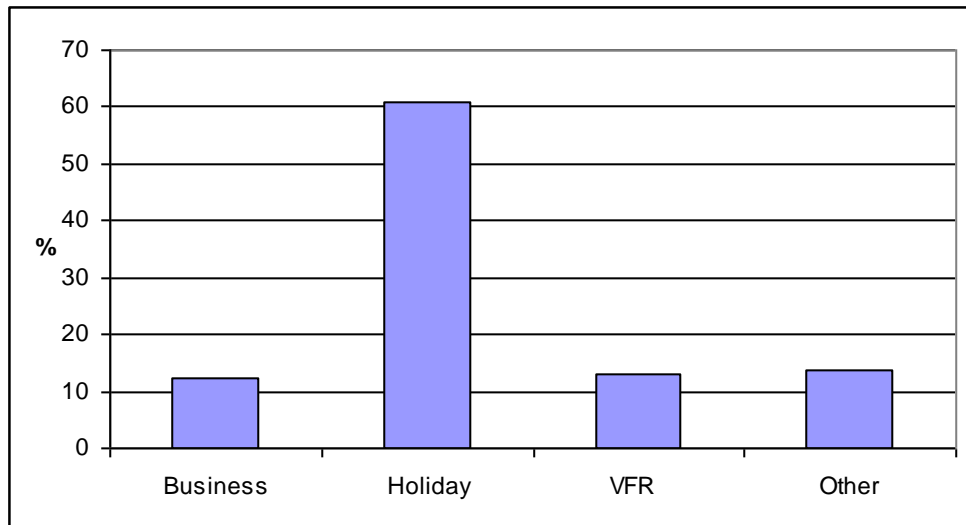
| Media | Count | % |
|----------------------------|-------------|---------------|
| Advertisements | 375 | 4.13 |
| Brochure/ Travel Guide | 2153 | 23.73 |
| Fax On Demand | 2 | 0.02 |
| History Books | 122 | 1.34 |
| Information Sign | 202 | 2.23 |
| Other | 578 | 6.37 |
| Print Ad | 9 | 0.10 |
| Radio Advertisement | 1 | 0.01 |
| Road Sign | 291 | 3.21 |
| Tourism Information Office | 377 | 4.16 |
| TV Advertisement | 8 | 0.09 |
| Web Site | 67 | 0.74 |
| Word Of Mouth | 4887 | 53.87 |
| Total | 9072 | 100.00 |

Word-of-mouth remains the most influential source of information for museums and art galleries, even more so than for other amenities making use of the TKZN visitor books. In this report period, word-of-mouth communication affected the behaviour of almost 54% of the respondents who filled in visitor book entries, the same result as shown in the previous survey period. Brochures and travel guides also remained important influence media, accounting for around a quarter of the total visitors. These results indicate the growing importance of media advertising in encouraging people to make use of facilities such as art galleries and museums.

Table 11: Museum and Art Gallery Respondents by Purpose of Visit

| Purpose | Number | % |
|--------------|--------------|---------------|
| Business | 1337 | 12.47 |
| Holiday | 6530 | 60.92 |
| VFR | 1379 | 12.87 |
| Other | 1473 | 13.74 |
| Total | 10719 | 100.00 |

Figure 11: Museum and Art Gallery Respondents by Purpose of Visit – January 1998 to September 2004



As expected, once again by far the majority of the visitors to art galleries and museums who filled in visitor book entries were those on holiday, and the second most important category was of those people who were visiting friends and relatives. The numbers of people who made use of museums and art galleries and who were in the area for the purposes of a holiday remained at almost 61%.

An interesting finding was, once again, the continued decrease in the number of people who were on business and who spent time in museums and in art galleries during that time – from just over 21% down to about 18%, to under 15%, to 14.7%, 14% and now to under 13%. This was a somewhat different finding than that shown in the results of the total number of people who filled in visitor book data at all amenities using them. It was an indication of the appeal museums and art galleries have for business people who perhaps have some time to spare during business trips. The information also suggested that business people could be targeted, in terms of advertising, and encouraged to make greater use of such facilities.

4. Regional Analyses

This report provides a continuation of the new section in the analyses of the total respondents for the standard visitor books. Here, the amenities, facilities and accommodation venues participating in the project are grouped according to the tourism region into which they fall. With time, all regions will be represented more fully but in this report only a high level analysis is presented for each region.

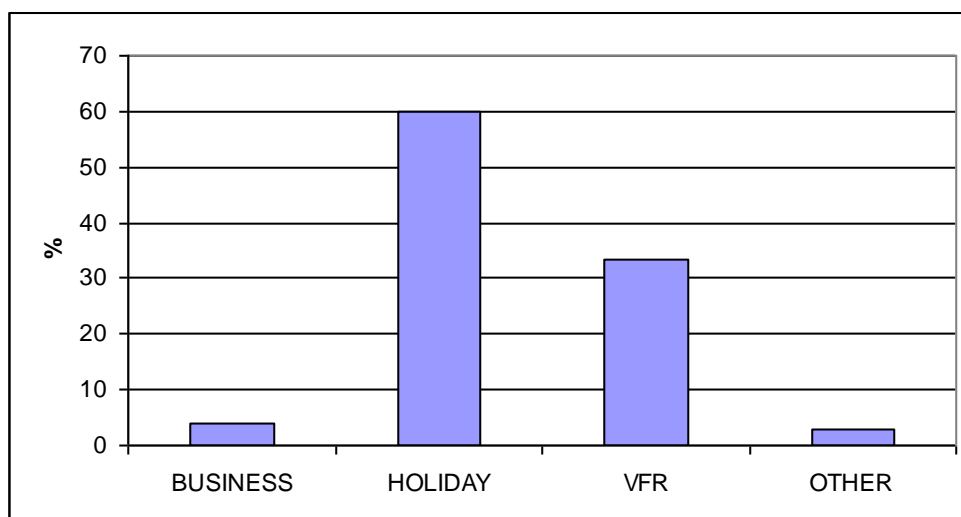
4.1 South Coast

The reasons why respondents who filled in visitor book data travelled to the South Coast are presented in the table below:

Table 12: South Coast Respondents by Purpose of Visit – September 2004

| Purpose | Total | % |
|--------------|--------------|---------------|
| Business | 1092 | 3.90 |
| Holiday | 16726 | 59.77 |
| VFR | 9349 | 33.41 |
| Other | 818 | 2.92 |
| Total | 27985 | 100.00 |

Figure 12: South Coast Respondents by Purpose of Visit – September 2004



As is clearly seen from the table and graph above, the vast majority of respondents had gone to the South Coast purely for holiday purposes. Almost 34% were in that area to visit friends and relatives, a slight increase from the previous report, but few were there for business or other purposes. This further confirms the findings of the TKZN Domestic

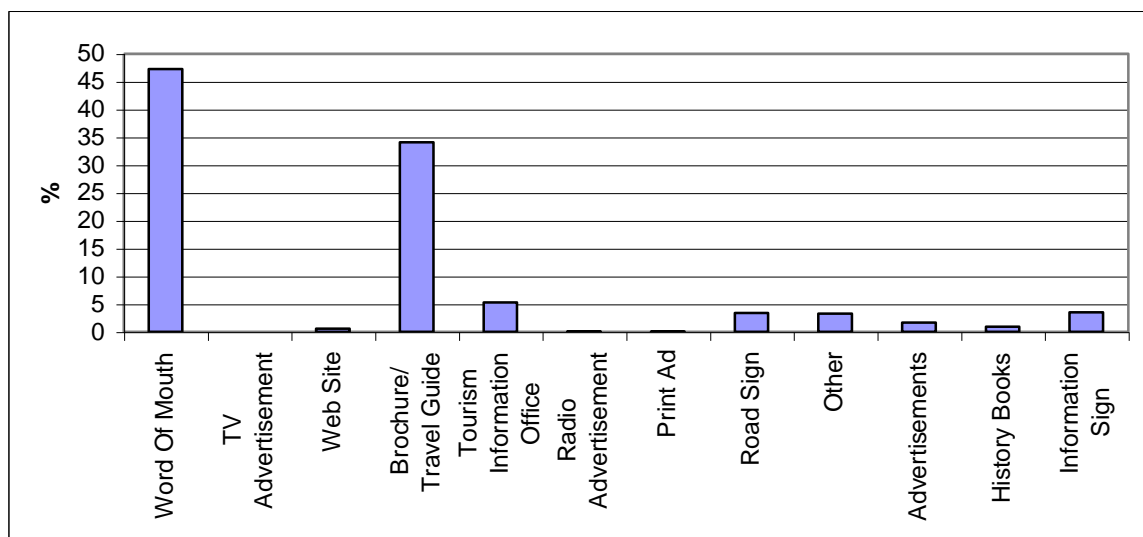
Consumer Surveys which indicate that the South Coast is an extremely popular holiday destination.

What is also interesting for the purposes of regional analyses is to consider how the respondents found out about an area or facility, or what influenced their decision to visit the area to enjoy the facility. In the table and graph below, this information is provided:

Table 13: South Coast Respondents by Media – September 2004

| Media | Total | % |
|----------------------------|--------------|---------------|
| Word Of Mouth | 11955 | 47.25 |
| TV Advertisement | 1 | 0.00 |
| Web Site | 150 | 0.59 |
| Brochure/ Travel Guide | 8626 | 34.09 |
| Tourism Information Office | 1336 | 5.28 |
| Radio Advertisement | 11 | 0.04 |
| Print Ad | 18 | 0.07 |
| Road Sign | 853 | 3.37 |
| Other | 825 | 3.26 |
| Advertisements | 416 | 1.64 |
| History Books | 228 | 0.90 |
| Information Sign | 884 | 3.49 |
| Total | 25303 | 100.00 |

Figure 13: South Coast Respondents by Media – September 2004



The figure and table above indicate clearly that most of the visitors to the South Coast obtain their information about the area and its facilities via word-of-mouth. A close second in importance is the use of travel guides, brochures and such written material, all of continued

and increasing importance as means of informing tourists (and potential tourists) about destinations, as of attracting them to those destinations.

Another point to consider is where these visitors come from and this information is displayed in the table below:

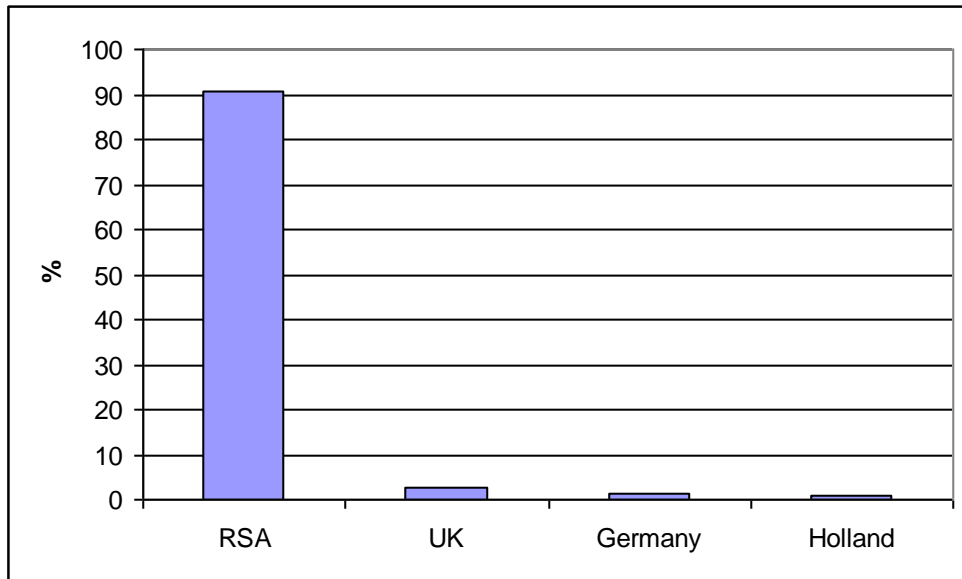
Table 14: South Coast Visitors by Country

| Country | Count | % |
|----------------|-------|------|
| Algeria | 2 | 0.01 |
| Angola | 2 | 0.01 |
| Antigua | 4 | 0.01 |
| Argentina | 13 | 0.04 |
| Australia | 122 | 0.40 |
| Austria | 25 | 0.08 |
| Bahamas | 3 | 0.01 |
| Belgium | 63 | 0.21 |
| Bermuda | 1 | 0.00 |
| Bolivia | 4 | 0.01 |
| Botswana | 28 | 0.09 |
| Brazil | 7 | 0.02 |
| Bulgaria | 1 | 0.00 |
| Cameroon | 6 | 0.02 |
| Canada | 83 | 0.27 |
| China | 6 | 0.02 |
| Congo | 1 | 0.00 |
| Croatia | 1 | 0.00 |
| Cyprus | 1 | 0.00 |
| Czech Republic | 8 | 0.03 |
| Denmark | 18 | 0.06 |
| Finland | 9 | 0.03 |
| France | 89 | 0.29 |
| Gabon | 2 | 0.01 |
| Germany | 428 | 1.42 |
| Ghana | 2 | 0.01 |
| Greece | 3 | 0.01 |
| Hungary | 9 | 0.03 |
| Iceland | 3 | 0.01 |
| India | 6 | 0.02 |
| Ireland | 42 | 0.14 |
| Israel | 22 | 0.07 |
| Italy | 54 | 0.18 |
| Jamaica | 2 | 0.01 |
| Japan | 5 | 0.02 |
| Kenya | 9 | 0.03 |
| Korea | 8 | 0.03 |
| Lesotho | 22 | 0.07 |
| Lichtenburg | 2 | 0.01 |
| Malawi | 7 | 0.02 |
| Malaysia | 5 | 0.02 |

| | | |
|--------------|--------------|---------------|
| Mauritius | 5 | 0.02 |
| Mexico | 2 | 0.01 |
| Mozambique | 10 | 0.03 |
| Namibia | 14 | 0.05 |
| Nepal | 1 | 0.00 |
| Netherlands | 297 | 0.98 |
| New Zealand | 44 | 0.15 |
| Nigeria | 1 | 0.00 |
| Norway | 21 | 0.07 |
| Pakistan | 1 | 0.00 |
| Philippines | 1 | 0.00 |
| Poland | 3 | 0.01 |
| Portugal | 1 | 0.00 |
| Reunion | 19 | 0.06 |
| Romania | 2 | 0.01 |
| Rsa | 27378 | 90.52 |
| Russia | 10 | 0.03 |
| Saudi Arabia | 8 | 0.03 |
| Scotland | 61 | 0.20 |
| Singapore | 3 | 0.01 |
| Slovakia | 1 | 0.00 |
| Slovenia | 1 | 0.00 |
| Spain | 25 | 0.08 |
| Sri Lanka | 2 | 0.01 |
| Swaziland | 17 | 0.06 |
| Sweden | 36 | 0.12 |
| Switzerland | 60 | 0.20 |
| Taiwan | 1 | 0.00 |
| Tanzania | 1 | 0.00 |
| Thailand | 1 | 0.00 |
| Turkey | 2 | 0.01 |
| Uae | 2 | 0.01 |
| Uganda | 2 | 0.01 |
| Uk | 792 | 2.62 |
| Ukraine | 1 | 0.00 |
| Uruguay | 2 | 0.01 |
| Usa | 206 | 0.68 |
| Yugoslavia | 2 | 0.01 |
| Zambia | 8 | 0.03 |
| Zimbabwe | 73 | 0.24 |
| Total | 30245 | 100.00 |

Over 90% of the visitors to the South Coast who filled in visitor books originated from within the country and from the UK (2.7%), with very small numbers from elsewhere. The graph below provides a clearer display of the home countries of visitors to the South Coast area and amenities.

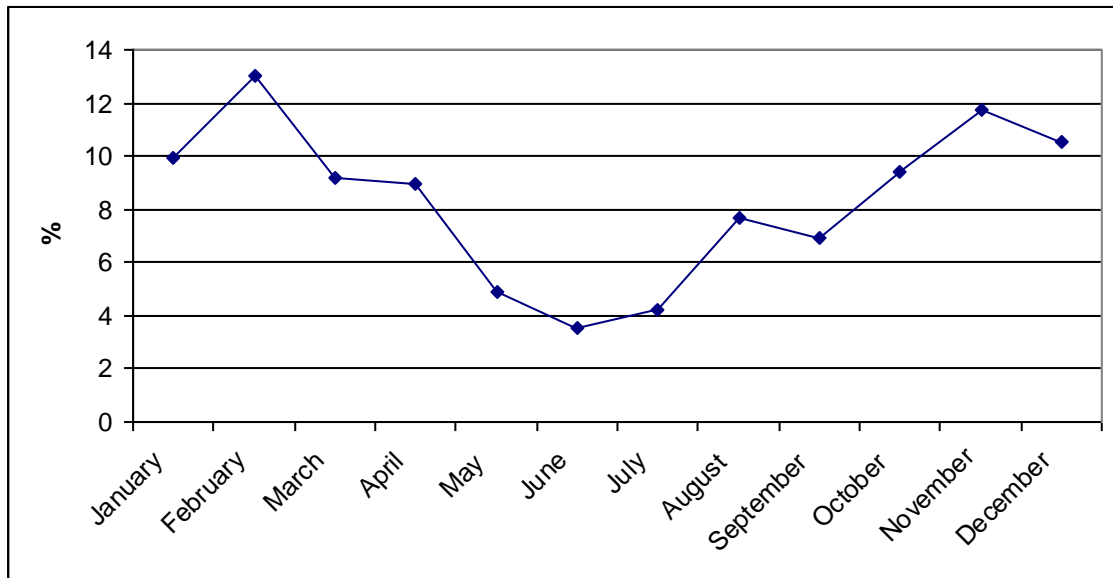
Table 15: South Coast Visitors by Country



The South Coast is again shown to be an increasingly popular destination for South African, and particularly KZN holiday-makers.

It was also felt it might be useful to include a graph of the seasonality shown by visitors to the various destinations. The graph below indicates the seasonality of foreign visitors to the South Coast:

Table 16: Foreign Holidaymakers to the South Coast by Month

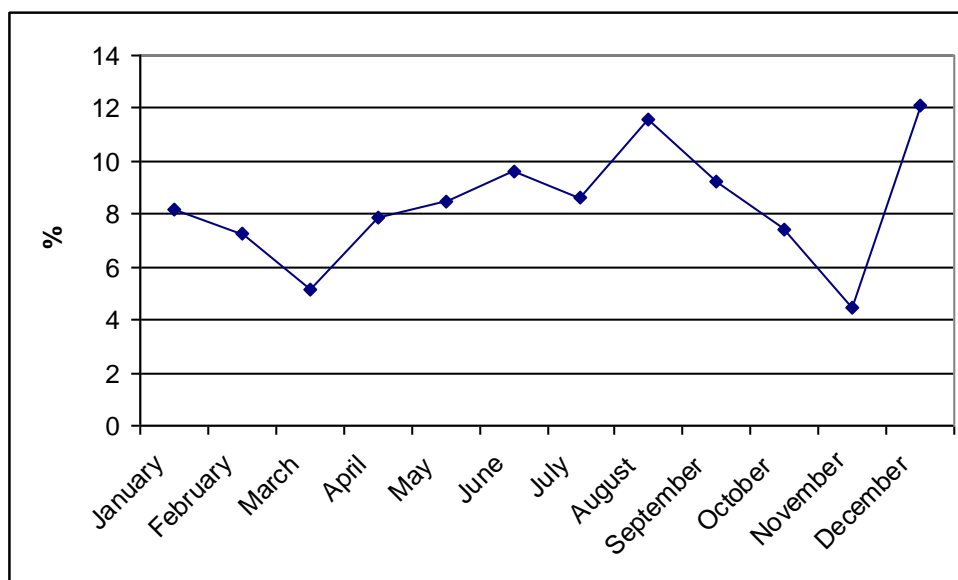


As this graph indicates, the most popular months for foreign holidaymakers to visit the South Coast are those in summer. So far, there is not much of an indication that a winter event such as the Sardine Run and associated festivals, are making much of an impact on

these visitors, but it should be remembered that these data only pertain to people who fill in Visitor Books and not to all visitors to the South Coast.

This graph can be compared to the seasonality of local, or South African holidaymakers:

Table 17: Domestic Holidaymakers to the South Coast by Month



As can be seen from this graph, the situation is quite different. When only domestic holidaymakers are considered, the winter months, especially August, are most popular. This trend is extremely important to recognize as it helps to 'even out' the seasonality experienced with foreign visitors.

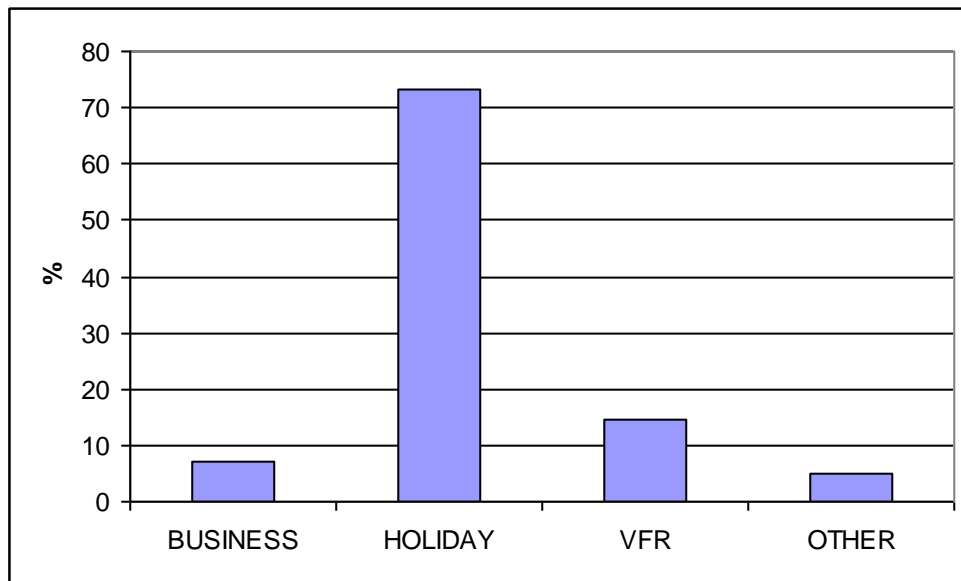
4.2 Drakensberg and East Griqualand

Respondents who visited the Drakensberg and filled in visitor book forms at participating facilities in that area provided an indication as to their main purpose of visiting, as shown in the table below:

Table 18: Drakensberg Respondents by Purpose of Visit – September 2004

| Purpose | Total | % |
|--------------|--------------|---------------|
| Business | 766 | 7.14 |
| Holiday | 7871 | 73.38 |
| VFR | 1557 | 14.51 |
| Other | 533 | 4.97 |
| Total | 10727 | 100.00 |

Figure 19: Drakensberg Respondents by Purpose of Visit – September 2004

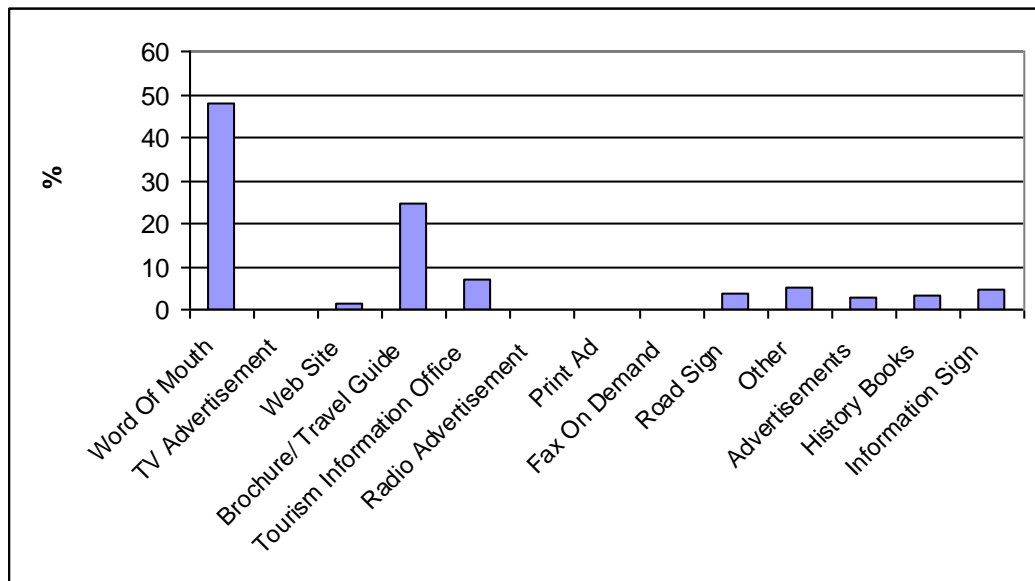


Once again the vast majority of people who filled in visitor book information, in the Drakensberg area this time, were there for a holiday – 74%. Again it was found that almost 15% of the total who were in the area visiting friends or relatives. However, there were no major changes from the previous report.

Table 20: Drakensberg Respondents by Media – September 2004

| Media | Total Of ID | % |
|----------------------------|-------------|---------------|
| Word Of Mouth | 4542 | 47.86 |
| TV Advertisement | 3 | 0.03 |
| Web Site | 141 | 1.49 |
| Brochure/ Travel Guide | 2334 | 24.59 |
| Tourism Information Office | 645 | 6.80 |
| Radio Advertisement | 12 | 0.13 |
| Print Ad | 11 | 0.12 |
| Fax On Demand | 1 | 0.01 |
| Road Sign | 352 | 3.71 |
| Other | 474 | 4.99 |
| Advertisements | 249 | 2.62 |
| History Books | 301 | 3.17 |
| Information Sign | 425 | 4.48 |
| Total | 9490 | 100.00 |

Figure 21: Drakensberg Respondents by Media – September 2004



Clearly word-of-mouth communication again had the strongest effect in alerting people to the Drakensberg area and its facilities and in attracting people to visit. The second most important form of media affecting the awareness of respondents and attracting them to the area was that of specific print media – brochures and travel guides on the area. None of the other media accounted for even 10% of the total although tourist information offices are becoming more frequently used.

It was useful to find out where visitors to the Drakensberg area originated, particularly in terms of its declaration as a World Heritage Site, and in view of the World Parks Congress in 2002 for which some 3 000 foreign delegates gathered in Durban to discuss issues surrounding national and other parks and wild places. The results are depicted below:

Table 22: Drakensberg Visitors by Country

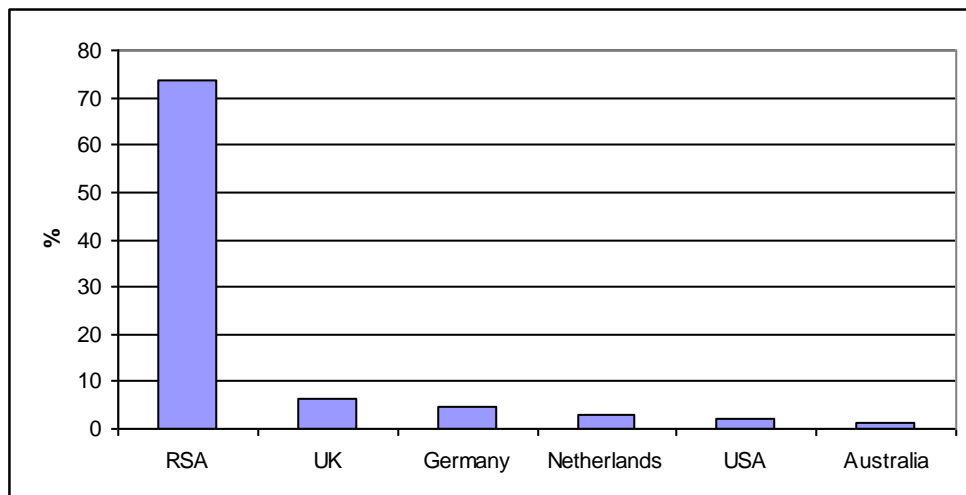
| Country | Number | % |
|-----------|--------|------|
| Angola | 2 | 0.02 |
| Antigua | 1 | 0.01 |
| Argentina | 12 | 0.11 |
| Australia | 146 | 1.35 |
| Austria | 23 | 0.21 |
| Belgium | 75 | 0.69 |
| Botswana | 26 | 0.24 |
| Brazil | 3 | 0.03 |
| Burundi | 1 | 0.01 |
| Canada | 55 | 0.51 |
| Chile | 1 | 0.01 |
| China | 6 | 0.06 |

| | | |
|----------------|------|-------|
| Congo | 1 | 0.01 |
| Croatia | 1 | 0.01 |
| Cyprus | 2 | 0.02 |
| Czech Republic | 15 | 0.14 |
| Denmark | 17 | 0.16 |
| Djibouti | 2 | 0.02 |
| Egypt | 1 | 0.01 |
| Ethiopia | 2 | 0.02 |
| Finland | 9 | 0.08 |
| France | 105 | 0.97 |
| Gabon | 1 | 0.01 |
| Germany | 487 | 4.50 |
| Ghana | 4 | 0.04 |
| Greece | 3 | 0.03 |
| Greenland | 1 | 0.01 |
| Guatemala | 1 | 0.01 |
| Hungary | 7 | 0.06 |
| Iceland | 1 | 0.01 |
| India | 12 | 0.11 |
| Indonesia | 1 | 0.01 |
| Ireland | 45 | 0.42 |
| Israel | 24 | 0.22 |
| Italy | 34 | 0.31 |
| Jamaica | 2 | 0.02 |
| Japan | 8 | 0.07 |
| Kenya | 17 | 0.16 |
| Korea | 6 | 0.06 |
| Kuwait | 1 | 0.01 |
| Lesotho | 15 | 0.14 |
| Luxembourg | 1 | 0.01 |
| Madagascar | 1 | 0.01 |
| Malawi | 7 | 0.06 |
| Malaysia | 1 | 0.01 |
| Mauritius | 6 | 0.06 |
| Mexico | 2 | 0.02 |
| Mozambique | 12 | 0.11 |
| Namibia | 11 | 0.10 |
| Netherlands | 330 | 3.05 |
| New Guinea | 1 | 0.01 |
| New Zealand | 43 | 0.40 |
| Norway | 20 | 0.18 |
| Oman | 1 | 0.01 |
| Peru | 1 | 0.01 |
| Philippines | 1 | 0.01 |
| Poland | 6 | 0.06 |
| Portugal | 3 | 0.03 |
| Reunion | 14 | 0.13 |
| Rsa | 7971 | 73.61 |
| Russia | 6 | 0.06 |

| | | |
|--------------|--------------|---------------|
| Saudi Arabia | 5 | 0.05 |
| Scotland | 63 | 0.58 |
| Singapore | 4 | 0.04 |
| Slovakia | 1 | 0.01 |
| Slovenia | 2 | 0.02 |
| Spain | 25 | 0.23 |
| Sri Lanka | 1 | 0.01 |
| Swaziland | 22 | 0.20 |
| Sweden | 29 | 0.27 |
| Switzerland | 75 | 0.69 |
| Taiwan | 1 | 0.01 |
| Tanzania | 3 | 0.03 |
| Thailand | 2 | 0.02 |
| Turkey | 1 | 0.01 |
| Uae | 2 | 0.02 |
| Uganda | 3 | 0.03 |
| Uk | 681 | 6.29 |
| Uruguay | 2 | 0.02 |
| Usa | 225 | 2.08 |
| Venezuela | 3 | 0.03 |
| Zambia | 10 | 0.09 |
| Zimbabwe | 55 | 0.51 |
| Total | 10829 | 100.00 |

In graph format, the most important countries of origin are shown below:

Table 23: Drakensberg Visitors by Country

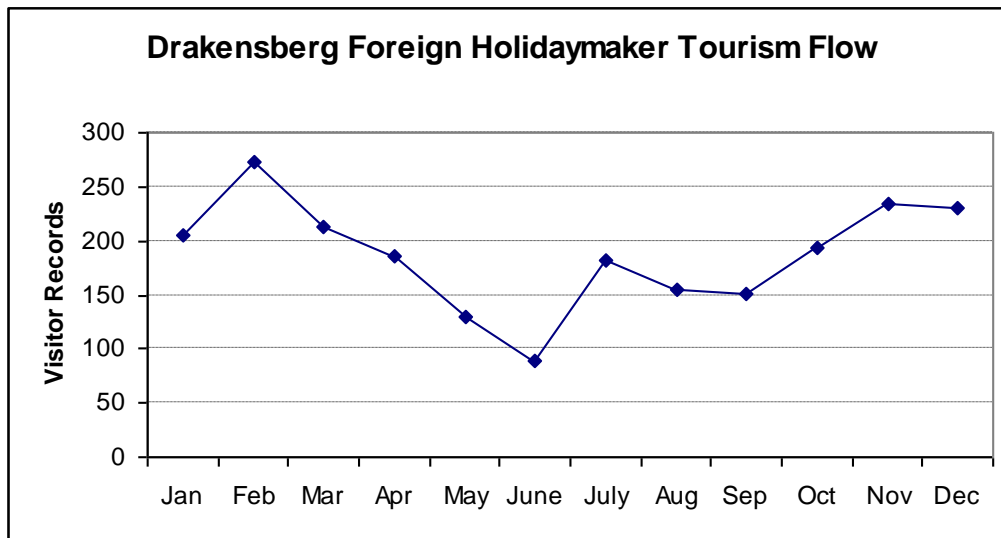


Once again, most of the visitors to the Drakensberg originated from within the country. Numbers of foreign visitors replicated the findings of the domestic consumer surveys undertaken by TKZN once more, with most coming from the UK and followed by those from Germany. It was interesting to note that there was a wider variety of countries contributing

visitors to the Drakensberg than to the South Coast – an indication that a World Heritage Site is indeed an attraction to foreign visitors.

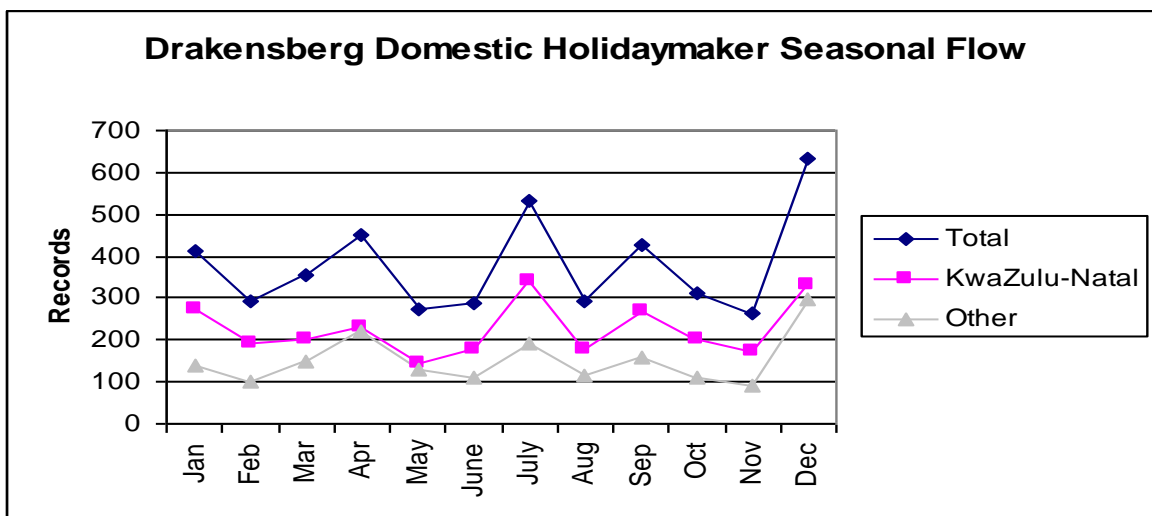
Seasonality is another component which provides an indication of the success of promotion and marketing campaigns of a destination. Foreign holidaymakers to the Drakensberg area display the following seasonal pattern:

Table 24: Drakensberg Foreign Holidaymakers – Seasonal Flow



It is interesting to see that foreign holidaymakers to the Drakensberg region visit there mostly in the high summer months, but winter is not popular. South Africans, however, are strongly attracted by the rarity of snow and icy weather, as is depicted in the graph below:

Table 24: Drakensberg Domestic Holidaymakers – Seasonal Flow



There are very definite peaks during the South African school holiday periods, and a particularly strong increase in July. It does seem curious, however, that there appear to be so few visitors during May and June, some of the very best periods in the mountains.

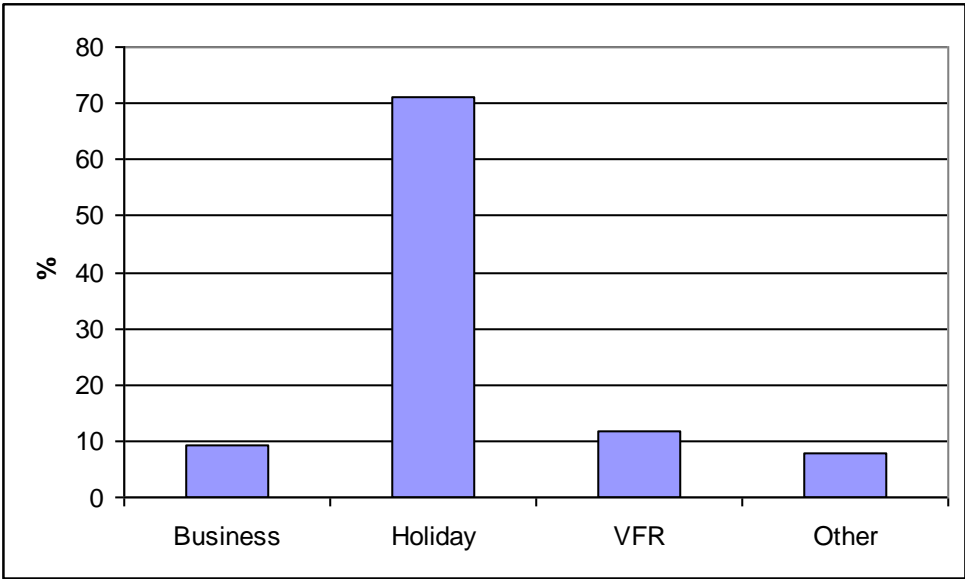
4.3 North Coast

Visitors to facilities and amenities on the KZN North Coast were also found to be in that area, not surprisingly, mainly for the purposes of enjoying a holiday as is shown in the table below.

Table 25: North Coast Respondents by Purpose of Visit – September 2004

| Purpose | Total Of ID | % |
|--------------|-------------|--------|
| Business | 171 | 9.19 |
| Holiday | 1323 | 71.13 |
| VFR | 219 | 11.77 |
| Other | 147 | 7.90 |
| Total | 1860 | 100.00 |

Figure 26: North Coast Respondents by Purpose of Visit – September 2004



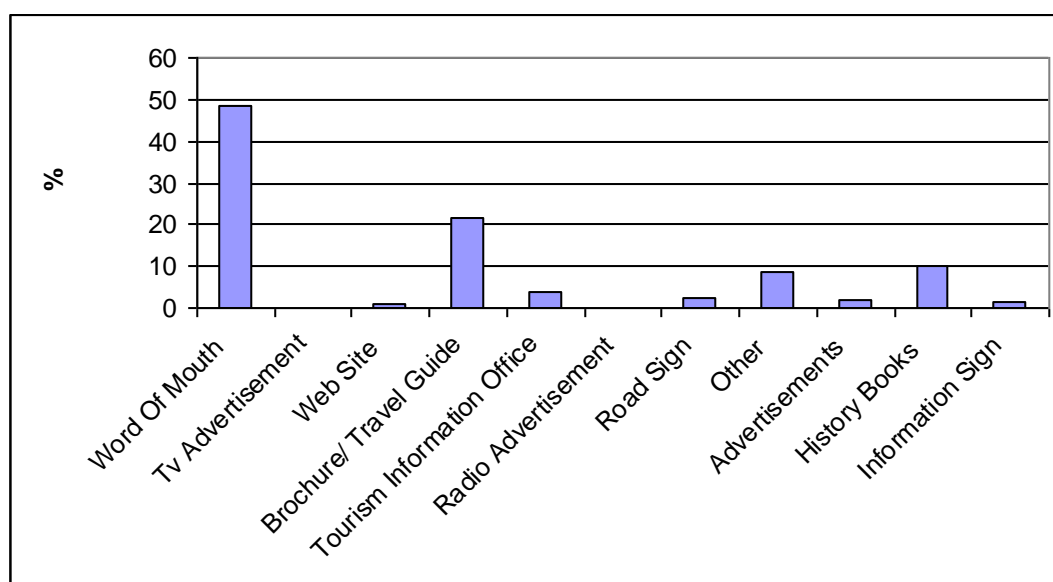
It was interesting to find out that although the majority of respondents who filled in visitor books in the North Coast area were there for the purposes of a holiday, respondents who were there for the purposes of business once again constituted just less than 10% of the total.

It also proves useful to find out where visitors obtained their information.

Table 27: North Coast Respondents by Media – September 2004

| Media | Total | % |
|----------------------------|-------------|---------------|
| Word Of Mouth | 836 | 48.52 |
| Tv Advertisement | 2 | 0.12 |
| Web Site | 19 | 1.10 |
| Brochure/ Travel Guide | 371 | 21.53 |
| Tourism Information Office | 68 | 3.95 |
| Radio Advertisement | 1 | 0.06 |
| Road Sign | 40 | 2.32 |
| Other | 150 | 8.71 |
| Advertisements | 34 | 1.97 |
| History Books | 175 | 10.16 |
| Information Sign | 27 | 1.57 |
| Grand Total | 1723 | 100.00 |

Figure 28: North Coast Respondents by Media – September 2004



A slightly different picture to that of the previous report arises when the media used by respondents to the North Coast are considered. In this case, word-of-mouth remains the most used medium, but travel guides and brochures showed greatly increased use, while Tourism Information Offices were frequented by only 4% of the total. History books showed up rather interestingly as a source of information used by visitors to the North Coast.

Finally, in terms of the North Coast, it is useful to many service providers in the area to know the countries from which their visitors originate:

Table 29: North Coast Visitors by Country

| Country | Number | % |
|----------------|---------------|----------|
| Argentina | 4 | 0.22 |
| Australia | 20 | 1.09 |
| Austria | 1 | 0.05 |
| Belgium | 6 | 0.33 |
| Botswana | 7 | 0.38 |
| Brazil | 2 | 0.11 |
| Bulgaria | 1 | 0.05 |
| Burundi | 1 | 0.05 |
| Canada | 17 | 0.92 |
| Chile | 2 | 0.11 |
| China | 4 | 0.22 |
| Colombia | 1 | 0.05 |
| Croatia | 1 | 0.05 |
| Czech Republic | 3 | 0.16 |
| Denmark | 7 | 0.38 |
| Finland | 1 | 0.05 |
| France | 23 | 1.25 |
| Germany | 96 | 5.22 |
| Ghana | 1 | 0.05 |
| Greece | 1 | 0.05 |
| Guatemala | 1 | 0.05 |
| Hungary | 1 | 0.05 |
| India | 1 | 0.05 |
| Indonesia | 1 | 0.05 |
| Ireland | 7 | 0.38 |
| Israel | 3 | 0.16 |
| Italy | 15 | 0.82 |
| Kenya | 3 | 0.16 |
| Lesotho | 2 | 0.11 |
| Lichtenburg | 1 | 0.05 |
| Malawi | 3 | 0.16 |
| Mauritius | 3 | 0.16 |
| Mozambique | 1 | 0.05 |
| Namibia | 2 | 0.11 |
| Nepal | 1 | 0.05 |
| Netherlands | 72 | 3.91 |
| New Zealand | 1 | 0.05 |
| Nigeria | 1 | 0.05 |
| Norway | 2 | 0.11 |
| Pakistan | 1 | 0.05 |
| Poland | 2 | 0.11 |
| Puerto Rico | 1 | 0.05 |
| Reunion | 5 | 0.27 |

| | | |
|--------------|-------------|---------------|
| Rsa | 1196 | 65.00 |
| Russia | 2 | 0.11 |
| Saudi Arabia | 1 | 0.05 |
| Scotland | 9 | 0.49 |
| Slovakia | 1 | 0.05 |
| Spain | 8 | 0.43 |
| Sri Lanka | 1 | 0.05 |
| Swaziland | 8 | 0.43 |
| Sweden | 4 | 0.22 |
| Switzerland | 5 | 0.27 |
| Tanzania | 4 | 0.22 |
| Turkey | 1 | 0.05 |
| Uganda | 1 | 0.05 |
| Uk | 140 | 7.61 |
| Usa | 102 | 5.54 |
| Venezuela | 2 | 0.11 |
| Zambia | 7 | 0.38 |
| Zimbabwe | 19 | 1.03 |
| Total | 1840 | 100.00 |

As expected, and as was the case with the other regions, the main country of origin for visitors to the area was South Africa, followed by Germany the UK and the USA.

Seasonality is also very pronounced amongst North Coast tourists:

Table 30: Seasonality of Foreign Holidaymakers to the North Coast

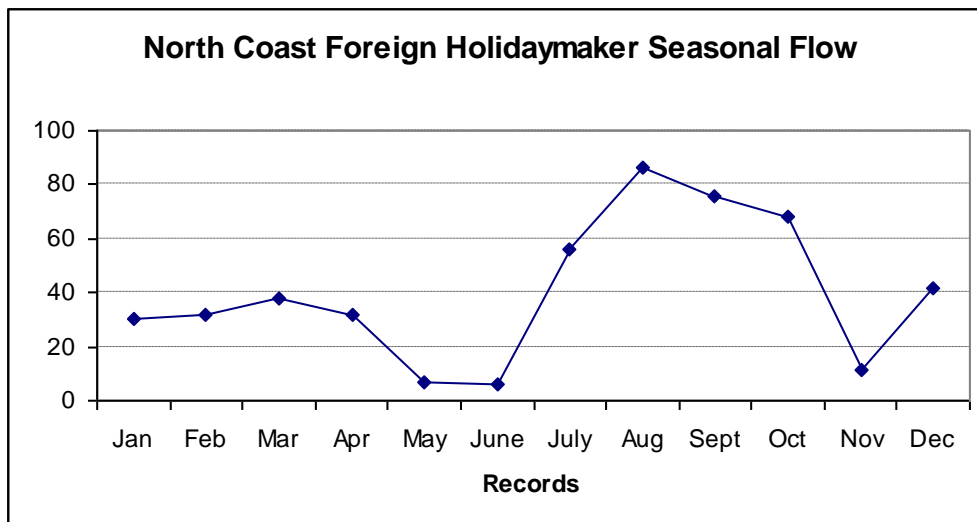
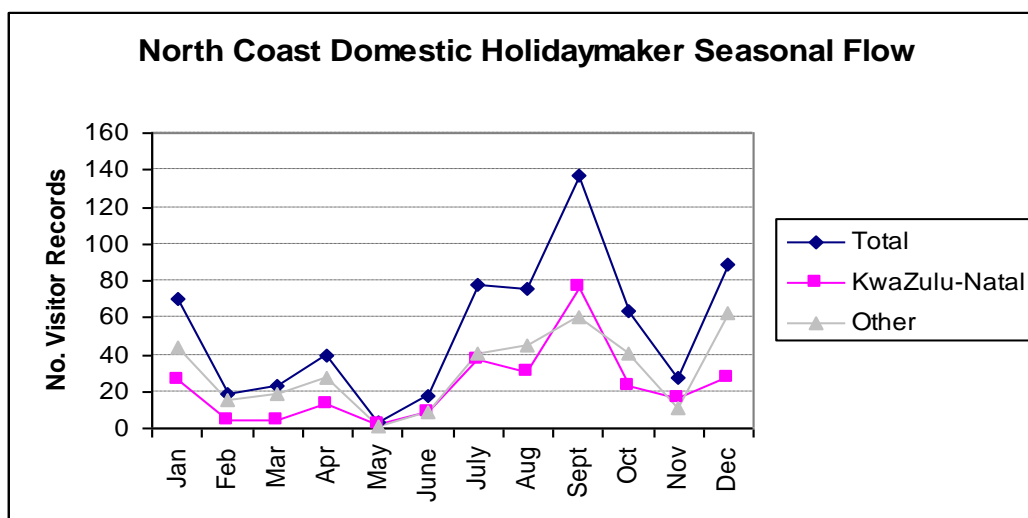


Table 31: Seasonality of Domestic Holidaymakers to the North Coast



The differences in seasonality between the North and South Coasts though are clear. In the case of the North Coast, both domestic and foreign holidaymakers make the most use of the area in the August, September and October period with far fewer numbers being recorded in the autumn months. There are still peaks of increased visitor numbers during the school holiday periods here, but they are less pronounced than was the case with the South Coast.

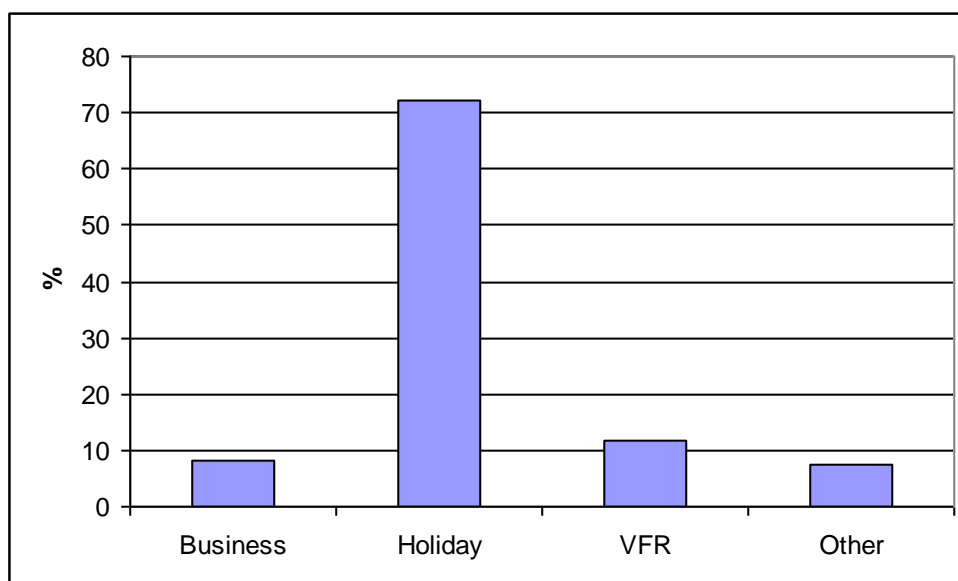
4.4 Battlefields

The visitors who made use of facilities in the battlefields area of the province were in that region mainly for a holiday.

Table 32: Battlefields Respondents by Purpose of Visit – September 2004

| Purpose | Total | % |
|--------------|--------------|---------------|
| Business | 1601 | 8.20 |
| Holiday | 14127 | 72.33 |
| VFR | 2327 | 11.91 |
| Other | 1476 | 7.56 |
| Total | 19531 | 100.00 |

Figure 33: Battlefields Respondents by Purpose of Visit – September 2004



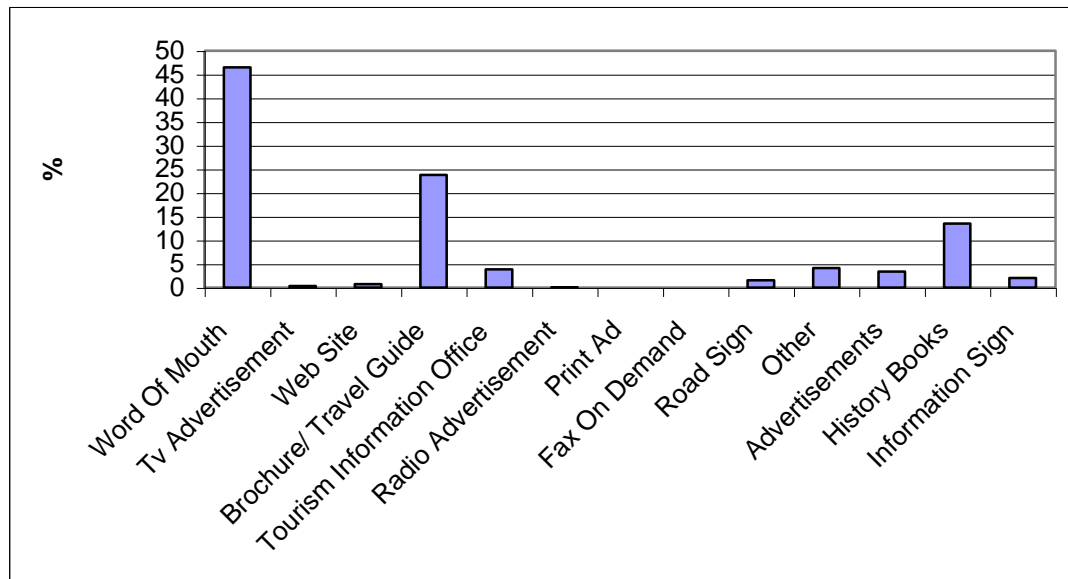
The Battlefields was also a place selected in the main by holidaymakers as a destination in which to enjoy new experiences. Over 70% of those who filled in visitor book forms were holidaymakers in this area.

These visitors found out about the facilities on offer in the following ways:

Table 34: Battlefields Respondents by Media – September 2004

| Media | Total | % |
|----------------------------|--------------|---------------|
| Word Of Mouth | 7644 | 46.50 |
| Tv Advertisement | 60 | 0.37 |
| Web Site | 122 | 0.74 |
| Brochure/ Travel Guide | 3906 | 23.76 |
| Tourism Information Office | 634 | 3.86 |
| Radio Advertisement | 8 | 0.05 |
| Print Ad | 5 | 0.03 |
| Fax On Demand | 5 | 0.03 |
| Road Sign | 257 | 1.56 |
| Other | 679 | 4.13 |
| Advertisements | 557 | 3.39 |
| History Books | 2221 | 13.51 |
| Information Sign | 339 | 2.06 |
| Total | 16437 | 100.00 |

Figure 35: Battlefields Respondents by Media – March 2004



Brochures and travel guides played a far more important part at all in the decision-making processes of those who visited facilities and attractions in the Battlefields area in this report than was indicated in the previous report. Word-of-mouth communication, along with the rather curious finding of history books, were the main influencing media.

Visitors to the Battlefields area also originated from many different places as the following table indicates:

Table 36: Battlefields by Country of Origin – September 2004

| Country | Number | % |
|-----------------|--------|------|
| Algeria | 2 | 0.01 |
| Angola | 3 | 0.01 |
| Antigua | 1 | 0.00 |
| Argentina | 17 | 0.08 |
| Australia | 467 | 2.12 |
| Austria | 33 | 0.15 |
| Belgium | 206 | 0.93 |
| Bermuda | 2 | 0.01 |
| Botswana | 28 | 0.13 |
| Brazil | 7 | 0.03 |
| Bulgaria | 1 | 0.00 |
| Cameroon | 12 | 0.05 |
| Canada | 176 | 0.80 |
| Channel Islands | 2 | 0.01 |
| Chile | 1 | 0.00 |
| China | 12 | 0.05 |
| Colombia | 3 | 0.01 |

| | | |
|----------------|-------|-------|
| Congo | 1 | 0.00 |
| Croatia | 6 | 0.03 |
| Cyprus | 8 | 0.04 |
| Czech Republic | 12 | 0.05 |
| Denmark | 42 | 0.19 |
| Egypt | 3 | 0.01 |
| Ethiopia | 1 | 0.00 |
| Finland | 9 | 0.04 |
| France | 221 | 1.00 |
| Gabon | 9 | 0.04 |
| Germany | 562 | 2.55 |
| Ghana | 1 | 0.00 |
| Greece | 2 | 0.01 |
| Honduras | 1 | 0.00 |
| Hungary | 5 | 0.02 |
| Iceland | 3 | 0.01 |
| India | 14 | 0.06 |
| Iran | 2 | 0.01 |
| Ireland | 172 | 0.78 |
| Israel | 9 | 0.04 |
| Italy | 55 | 0.25 |
| Jamaica | 2 | 0.01 |
| Japan | 13 | 0.06 |
| Kenya | 30 | 0.14 |
| Korea | 2 | 0.01 |
| Lesotho | 7 | 0.03 |
| Libya | 1 | 0.00 |
| Malawi | 10 | 0.05 |
| Malaysia | 6 | 0.03 |
| Mauritius | 2 | 0.01 |
| Mexico | 2 | 0.01 |
| Mozambique | 18 | 0.08 |
| Namibia | 24 | 0.11 |
| Nepal | 3 | 0.01 |
| Netherlands | 654 | 2.97 |
| New Guinea | 1 | 0.00 |
| New Zealand | 99 | 0.45 |
| Nigeria | 2 | 0.01 |
| Norway | 38 | 0.17 |
| Oman | 1 | 0.00 |
| Pakistan | 1 | 0.00 |
| Peru | 1 | 0.00 |
| Philippines | 2 | 0.01 |
| Poland | 11 | 0.05 |
| Portugal | 8 | 0.04 |
| Reunion | 23 | 0.10 |
| Rsa | 11677 | 52.99 |
| Russia | 15 | 0.07 |
| Rwanda | 1 | 0.00 |

| | | |
|--------------|--------------|---------------|
| Saudi Arabia | 19 | 0.09 |
| Scotland | 257 | 1.17 |
| Seychelles | 1 | 0.00 |
| Singapore | 3 | 0.01 |
| Slovakia | 2 | 0.01 |
| Spain | 34 | 0.15 |
| Swaziland | 37 | 0.17 |
| Sweden | 55 | 0.25 |
| Switzerland | 61 | 0.28 |
| Taiwan | 4 | 0.02 |
| Tanzania | 4 | 0.02 |
| Thailand | 8 | 0.04 |
| Turkey | 4 | 0.02 |
| Uae | 34 | 0.15 |
| Uganda | 4 | 0.02 |
| Uk | 5880 | 26.68 |
| Uruguay | 1 | 0.00 |
| Usa | 755 | 3.43 |
| Venezuela | 3 | 0.01 |
| Vietnam | 2 | 0.01 |
| Yugoslavia | 1 | 0.00 |
| Zambia | 22 | 0.10 |
| Zimbabwe | 80 | 0.36 |
| Total | 22036 | 100.00 |

As expected, the vast majority of visitors to the Battlefields area originate from within the country. Another large sector of visitors were from the UK followed from those from the USA, the Netherlands and Germany.

Seasonality is yet another factor which sheds light on how, when and to whom marketing campaigns for the Battlefields area need to be run.

Table 37: Seasonality of Foreign Holidaymakers to the Battlefields

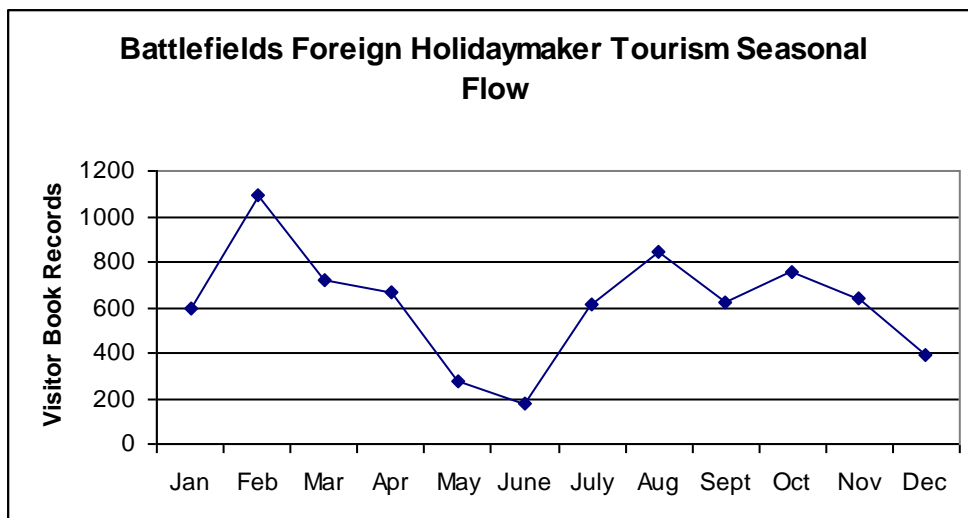
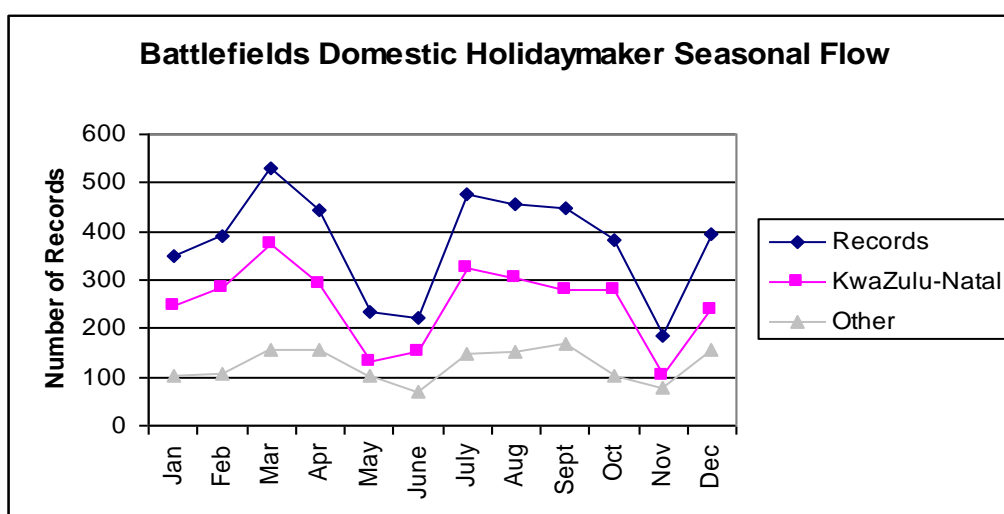


Table 38: Seasonality of Domestic Holidaymakers to the Battlefields



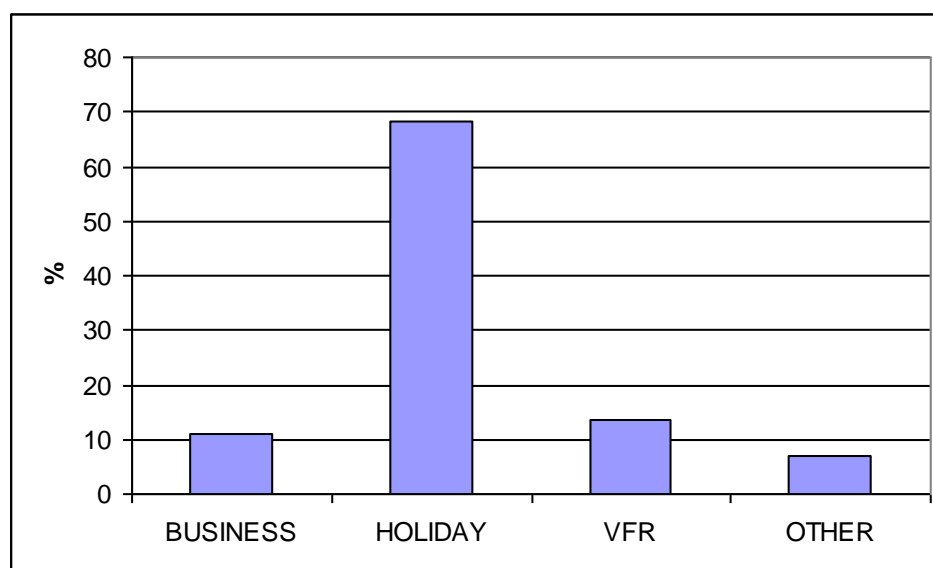
Once again, the importance of the winter holiday and autumn periods are outlined by the graphs above, for both the foreign and domestic holiday markets. Marketing campaigns for this destination need to concentrate on increasing visitors to the area during the slumps of May and June so as to reduce the negative effects of seasonality.

4.5 Zululand and Maputuland (now the Elephant Coast)

Table 39: Zululand and Maputuland Respondents by Purpose of Visit – September 2004

| Purpose | Total | % |
|--------------|--------------|---------------|
| Business | 1710 | 11.00 |
| Holiday | 10630 | 68.36 |
| VFR | 2138 | 13.75 |
| Other | 1071 | 6.89 |
| Total | 15549 | 100.00 |

Figure 40: Zululand and Maputuland Respondents by Purpose of Visit – September 2004



Over two thirds of the visitors to the Zululand/Maputaland area were there for the purposes of a holiday. Secondly, only 14% of the visitors to the area were visiting friends and relatives and 11% percent were there for business reasons.

In the main, visitors to the region were affected, in terms of their decisions to visit, by word-of-mouth (almost 47%) and by travel guides and travel brochures with other media having little effect, as the table below indicates. Information offices, however, are also becoming increasingly important. There was little evidence of the curiously high use of history books affecting decision-making in this area.

Table 41: Zululand and Maputuland Respondents by Media – September 2004

| Media | Count | % |
|----------------------------|--------------|---------------|
| Word of Mouth | 5963 | 46.87 |
| TV Advertisement | 12 | 0.09 |
| Web Site | 102 | 0.80 |
| Brochure/ Travel Guide | 4203 | 33.03 |
| Tourism Information Office | 756 | 5.94 |
| Radio Advertisement | 14 | 0.11 |
| Print Ad | 7 | 0.06 |
| Fax On Demand | 7 | 0.06 |
| Road Sign | 228 | 1.79 |
| Other | 504 | 3.96 |
| Advertisements | 217 | 1.71 |
| History Books | 487 | 3.83 |
| Information Sign | 223 | 1.75 |
| Total | 12723 | 100.00 |

Figure 42: Zululand and Maputuland Respondents by Media – September 2004

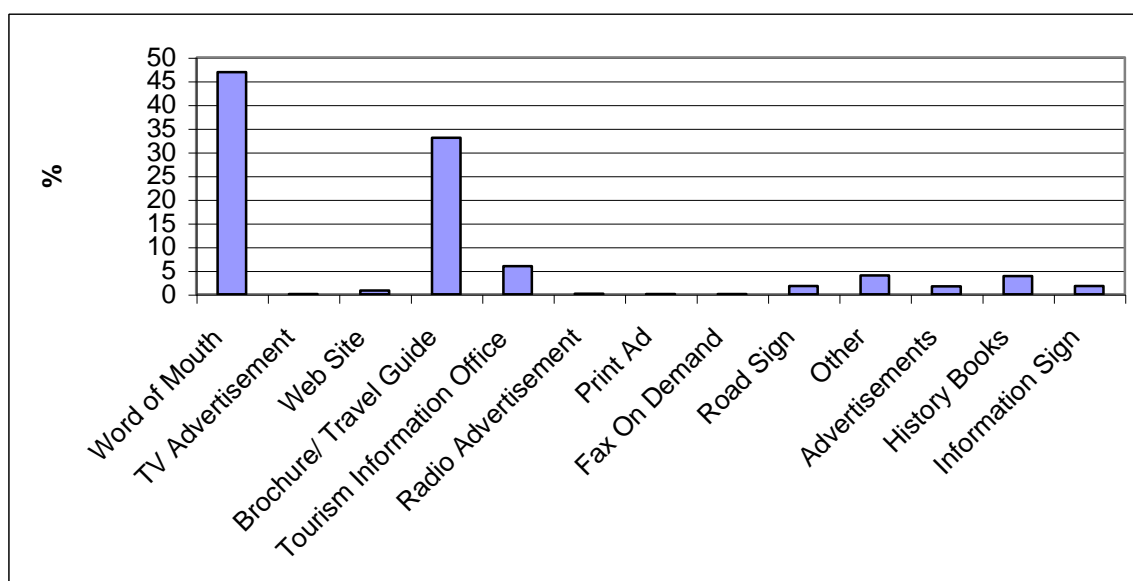


Table 43: Zululand and Maputuland Respondents by Country – September 2004

| Country | Total | % |
|-----------------|-------|------|
| Algeria | 1 | 0.01 |
| Angola | 9 | 0.06 |
| Antigua | 3 | 0.02 |
| Argentina | 35 | 0.22 |
| Australia | 314 | 2.00 |
| Austria | 85 | 0.54 |
| Bahamas | 6 | 0.04 |
| Belgium | 212 | 1.35 |
| Bermuda | 1 | 0.01 |
| Bolivia | 1 | 0.01 |
| Botswana | 16 | 0.10 |
| Brazil | 14 | 0.09 |
| Bulgaria | 2 | 0.01 |
| Cameroon | 2 | 0.01 |
| Canada | 183 | 1.17 |
| Channel Islands | 2 | 0.01 |
| Chile | 3 | 0.02 |
| China | 12 | 0.08 |
| Colombia | 6 | 0.04 |
| Croatia | 4 | 0.03 |
| Cuba | 2 | 0.01 |
| Cyprus | 2 | 0.01 |
| Czech Republic | 23 | 0.15 |
| Denmark | 61 | 0.39 |

| | | |
|--------------|------|-------|
| Egypt | 4 | 0.03 |
| Eston | 1 | 0.01 |
| Finland | 25 | 0.16 |
| France | 771 | 4.92 |
| Gabon | 5 | 0.03 |
| Germany | 922 | 5.88 |
| Ghana | 3 | 0.02 |
| Greece | 11 | 0.07 |
| Hungary | 12 | 0.08 |
| Iceland | 2 | 0.01 |
| India | 3 | 0.02 |
| Iran | 3 | 0.02 |
| Ireland | 110 | 0.70 |
| Israel | 50 | 0.32 |
| Italy | 219 | 1.40 |
| Ivory Coast | 1 | 0.01 |
| Jamaica | 2 | 0.01 |
| Japan | 27 | 0.17 |
| Kenya | 16 | 0.10 |
| Korea | 5 | 0.03 |
| Lebanon | 1 | 0.01 |
| Lesotho | 14 | 0.09 |
| Luxembourg | 1 | 0.01 |
| Malawi | 12 | 0.08 |
| Malaysia | 10 | 0.06 |
| Mauritius | 1 | 0.01 |
| Mexico | 5 | 0.03 |
| Mozambique | 34 | 0.22 |
| Namibia | 20 | 0.13 |
| Nepal | 5 | 0.03 |
| Netherlands | 751 | 4.79 |
| New Zealand | 80 | 0.51 |
| Nigeria | 13 | 0.08 |
| Norway | 203 | 1.29 |
| Peru | 1 | 0.01 |
| Poland | 13 | 0.08 |
| Portugal | 5 | 0.03 |
| Puerto Rico | 1 | 0.01 |
| Reunion | 67 | 0.43 |
| Romania | 3 | 0.02 |
| Rsa | 8373 | 53.41 |
| Russia | 10 | 0.06 |
| Rwanda | 2 | 0.01 |
| Saudi Arabia | 9 | 0.06 |
| Scotland | 91 | 0.58 |
| Senegal | 1 | 0.01 |
| Singapore | 8 | 0.05 |
| Slovakia | 1 | 0.01 |
| Slovenia | 3 | 0.02 |

| | | |
|--------------|--------------|---------------|
| Somalia | 1 | 0.01 |
| Spain | 64 | 0.41 |
| Sri Lanka | 2 | 0.01 |
| Swaziland | 37 | 0.24 |
| Sweden | 93 | 0.59 |
| Switzerland | 120 | 0.77 |
| Taiwan | 4 | 0.03 |
| Tanzania | 8 | 0.05 |
| Thailand | 5 | 0.03 |
| Turkey | 4 | 0.03 |
| Uae | 14 | 0.09 |
| Uganda | 9 | 0.06 |
| Uk | 1625 | 10.37 |
| Ukraine | 1 | 0.01 |
| Uruguay | 7 | 0.04 |
| Usa | 682 | 4.35 |
| Venezuela | 1 | 0.01 |
| Vietnam | 3 | 0.02 |
| Yugoslavia | 1 | 0.01 |
| Zambia | 19 | 0.12 |
| Zimbabwe | 48 | 0.31 |
| Total | 15677 | 100.00 |

Over half the visitors (54%) to the area again originated mainly from within the country, and these were followed, as is the pattern throughout KZN, by visitors from the UK, the USA, the Netherlands and Germany.

Seasonality is also marked in terms of the Zululand area as is shown by the graphs which follow:

Table 44: Zululand Foreign Holidaymaker Seasonality

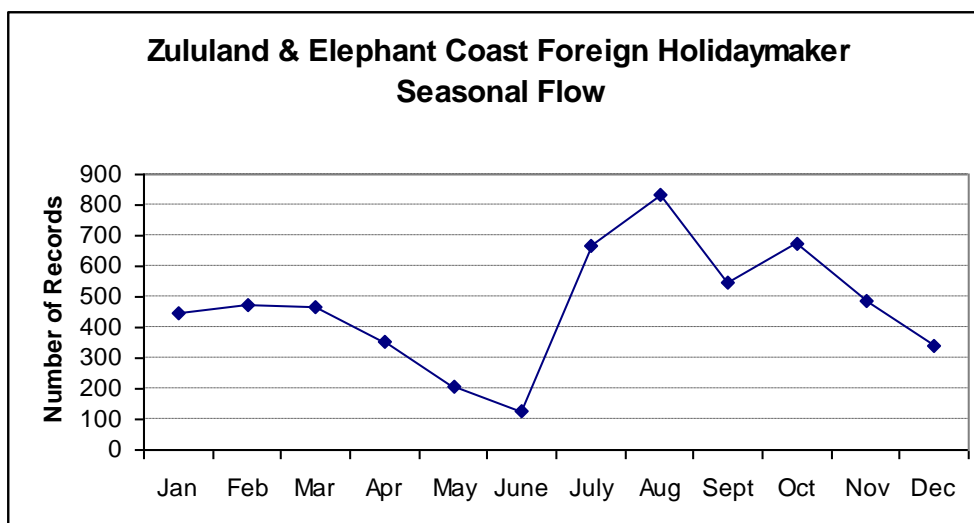
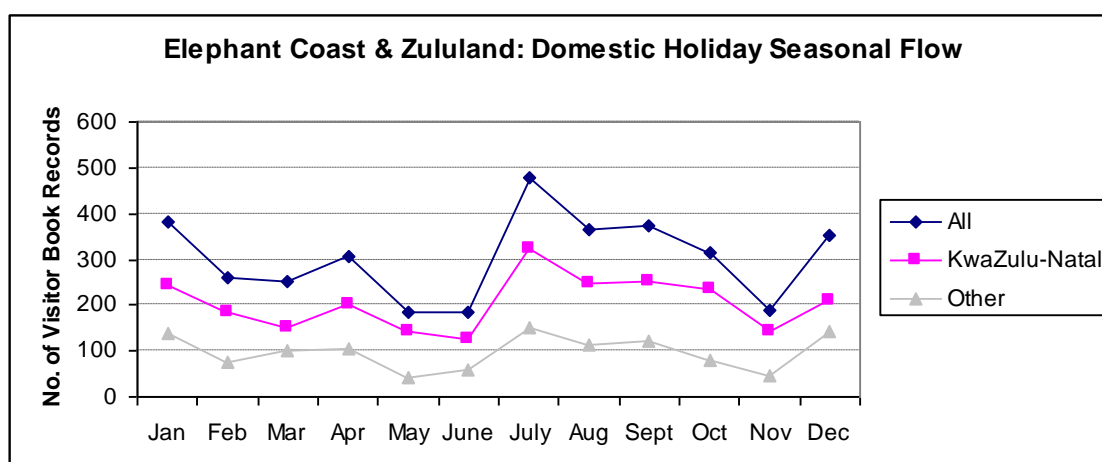


Table 45: Zululand Domestic Holidaymaker Seasonality



Although the trends of low visitor numbers in May and June are similar when considering both foreign and domestic visitors, the polarization is far more pronounced amongst foreign holidaymakers than with domestic ones. Foreign holidaymakers also display a distinct preference for the August period whereas domestic holidaymakers prefer the Zululand and Elephant Coast areas in July. This appears to be as a result of the late winter attraction to game reserves in the area when the vegetation is at its lowest enabling game to be sighted more easily, and also the lower temperatures which make traveling more comfortable. It is also the low season in terms of malaria.

Note should be taken though of the enormous successes being achieved by the Medical Research Council's anti-malaria spraying campaign in northern KZN, Swaziland and Mozambique where in excess of 90% decreases in incidence of the disease have been achieved in KZN. They hope to eradicate malaria entirely from South Africa by 2007, and the positive effects on tourism are already being felt.

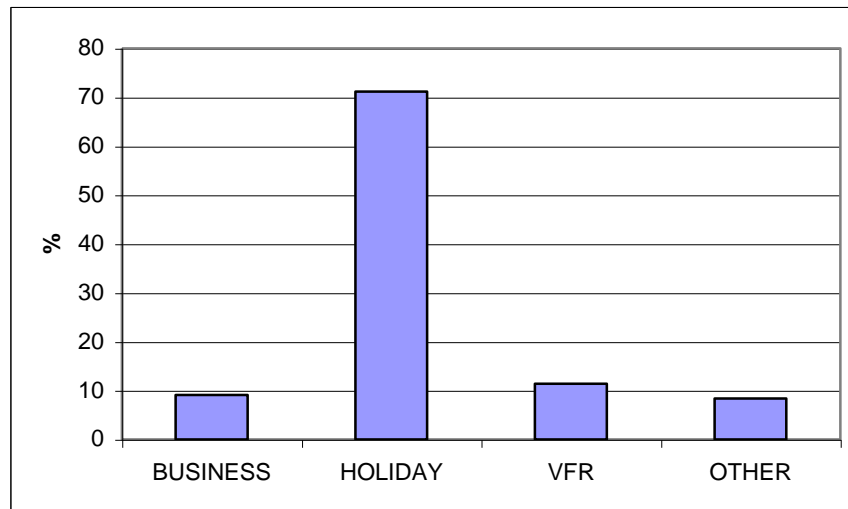
4.6 Durban Central and Surrounds

Table 46: Durban Respondents by Purpose of Visit – September 2004

| Purpose | Total | % |
|--------------|--------------|---------------|
| Business | 1633 | 9.10 |
| Holiday | 12768 | 71.14 |
| VFR | 2042 | 11.38 |
| Other | 1505 | 8.39 |
| Total | 17948 | 100.00 |

By far the majority of visitors to the Durban area were there for the purposes of having a holiday – over 70%. This is an expected finding for a destination which prides itself on the holiday experiences it offers.

Figure 47: Durban Respondents by Purpose of Visit – September 2004

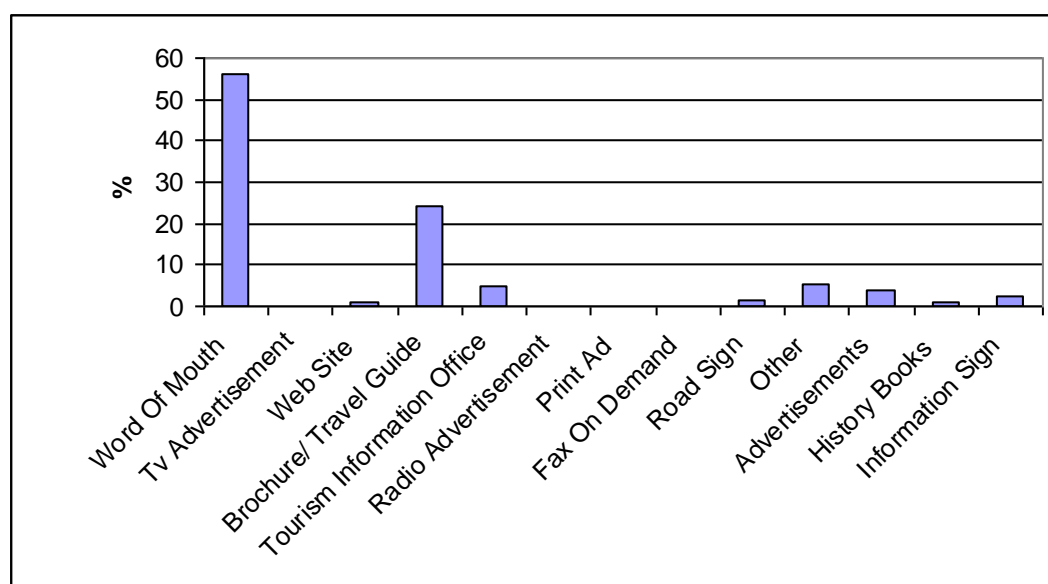


The graph and figure above are an indication that Durban remains the preferred holiday destination of South Africans.

Table 48: Durban Respondents by Media – September 2004

| Media | Total | % |
|----------------------------|--------------|---------------|
| Word Of Mouth | 8575 | 56.14 |
| Tv Advertisement | 20 | 0.13 |
| Web Site | 139 | 0.91 |
| Brochure/ Travel Guide | 3672 | 24.04 |
| Tourism Information Office | 741 | 4.85 |
| Radio Advertisement | 27 | 0.18 |
| Print Ad | 11 | 0.07 |
| Fax On Demand | 4 | 0.03 |
| Road Sign | 187 | 1.22 |
| Other | 827 | 5.41 |
| Advertisements | 578 | 3.78 |
| History Books | 139 | 0.91 |
| Information Sign | 354 | 2.32 |
| Total | 15274 | 100.00 |

Figure 49: Durban Respondents by Media – September 2004



Once again, word-of-mouth had the greatest effect on the decisions made by visitors to Durban explore a particular area or facility, accounting for over 56% of the total. Travel guides and travel brochures also had a substantial effect on the decisions made and in terms of increasing awareness of particular facilities and encouraging people to visit them.

TV and radio ads had very little effect on decision-making, as may be seen from the table and figure above, and media marketing campaigns would be well-advised to consider this finding carefully before spending money in this area.

Table 50: Durban Respondents by Country – September 2004

| Country | Count | % |
|-----------|-------|------|
| Algeria | 1 | 0.01 |
| Angola | 8 | 0.05 |
| Argentina | 104 | 0.59 |
| Australia | 294 | 1.66 |
| Austria | 59 | 0.33 |
| Bahamas | 6 | 0.03 |
| Belgium | 112 | 0.63 |
| Bermuda | 1 | 0.01 |
| Bolivia | 3 | 0.02 |
| Botswana | 57 | 0.32 |
| Brazil | 48 | 0.27 |
| Bulgaria | 3 | 0.02 |
| Burundi | 1 | 0.01 |
| Cameroon | 1 | 0.01 |
| Canada | 172 | 0.97 |

| | | |
|-----------------|-----|------|
| Cayman Islands | 2 | 0.01 |
| Channel Islands | 1 | 0.01 |
| Chile | 11 | 0.06 |
| China | 28 | 0.16 |
| Colombia | 5 | 0.03 |
| Congo | 10 | 0.06 |
| Costa Rica | 3 | 0.02 |
| Croatia | 6 | 0.03 |
| Cuba | 1 | 0.01 |
| Cyprus | 2 | 0.01 |
| Czech Republic | 36 | 0.20 |
| Denmark | 68 | 0.38 |
| Dominican Rep | 2 | 0.01 |
| Ecuador | 1 | 0.01 |
| Egypt | 5 | 0.03 |
| Estonia | 1 | 0.01 |
| Ethiopia | 7 | 0.04 |
| Finland | 41 | 0.23 |
| France | 281 | 1.59 |
| Gabon | 3 | 0.02 |
| Gambia | 1 | 0.01 |
| Germany | 802 | 4.52 |
| Ghana | 10 | 0.06 |
| Greece | 15 | 0.08 |
| Greenland | 1 | 0.01 |
| Guatemala | 1 | 0.01 |
| Honduras | 6 | 0.03 |
| Hungary | 45 | 0.25 |
| Iceland | 5 | 0.03 |
| India | 90 | 0.51 |
| Indonesia | 3 | 0.02 |
| Iran | 4 | 0.02 |
| Ireland | 153 | 0.86 |
| Israel | 44 | 0.25 |
| Italy | 143 | 0.81 |
| Ivory Coast | 3 | 0.02 |
| Jamaica | 10 | 0.06 |
| Japan | 34 | 0.19 |
| Kenya | 39 | 0.22 |
| Korea | 6 | 0.03 |
| Kuwait | 10 | 0.06 |
| Lesotho | 39 | 0.22 |
| Libya | 2 | 0.01 |
| Lichtenburg | 2 | 0.01 |
| Lithuania | 1 | 0.01 |
| Luxembourg | 1 | 0.01 |
| Madagascar | 1 | 0.01 |
| Malawi | 23 | 0.13 |
| Malaysia | 18 | 0.10 |

| | | |
|--------------|-------|-------|
| Mauritius | 63 | 0.36 |
| Mexico | 9 | 0.05 |
| Mozambique | 56 | 0.32 |
| Namibia | 35 | 0.20 |
| Nepal | 3 | 0.02 |
| Netherlands | 369 | 2.08 |
| New Guinea | 1 | 0.01 |
| New Zealand | 83 | 0.47 |
| Nigeria | 4 | 0.02 |
| Norway | 68 | 0.38 |
| Oman | 2 | 0.01 |
| Pakistan | 7 | 0.04 |
| Palestine | 2 | 0.01 |
| Paraguay | 1 | 0.01 |
| Peru | 2 | 0.01 |
| Philippines | 10 | 0.06 |
| Poland | 27 | 0.15 |
| Portugal | 33 | 0.19 |
| Reunion | 54 | 0.30 |
| Romania | 4 | 0.02 |
| Rsa | 10753 | 60.66 |
| Russia | 21 | 0.12 |
| Rwanda | 2 | 0.01 |
| Saudi Arabia | 23 | 0.13 |
| Scotland | 123 | 0.69 |
| Senegal | 2 | 0.01 |
| Seychelles | 2 | 0.01 |
| Singapore | 11 | 0.06 |
| Slovakia | 15 | 0.08 |
| Slovenia | 5 | 0.03 |
| Spain | 61 | 0.34 |
| Sri Lanka | 6 | 0.03 |
| Sudan | 2 | 0.01 |
| Swaziland | 76 | 0.43 |
| Sweden | 82 | 0.46 |
| Switzerland | 101 | 0.57 |
| Taiwan | 8 | 0.05 |
| Tanzania | 8 | 0.05 |
| Thailand | 22 | 0.12 |
| Trinidad | 1 | 0.01 |
| Turkey | 15 | 0.08 |
| Uae | 32 | 0.18 |
| Uganda | 19 | 0.11 |
| Uk | 1573 | 8.87 |
| Ukraine | 3 | 0.02 |
| Uruguay | 10 | 0.06 |
| Usa | 759 | 4.28 |
| Venezuela | 2 | 0.01 |
| Vietnam | 1 | 0.01 |

| | | |
|----------------|--------------|---------------|
| Virgin Islands | 1 | 0.01 |
| Yugoslavia | 1 | 0.01 |
| Zambia | 61 | 0.34 |
| Zimbabwe | 197 | 1.11 |
| Total | 17727 | 100.00 |

Once again, some 60% of the visitors to facilities within the Durban area originated from within the country. Once again, a substantial percentage – almost 10% - originated from the UK and large numbers came, too, from the USA, the Netherlands and Germany, following the historical visitor pattern and profile for Durban and for KZN as a whole.

Patterns of seasonality are also notable in Durban as the following graphs indicate:

Table 51: Seasonality of Foreign Holidaymakers to Durban

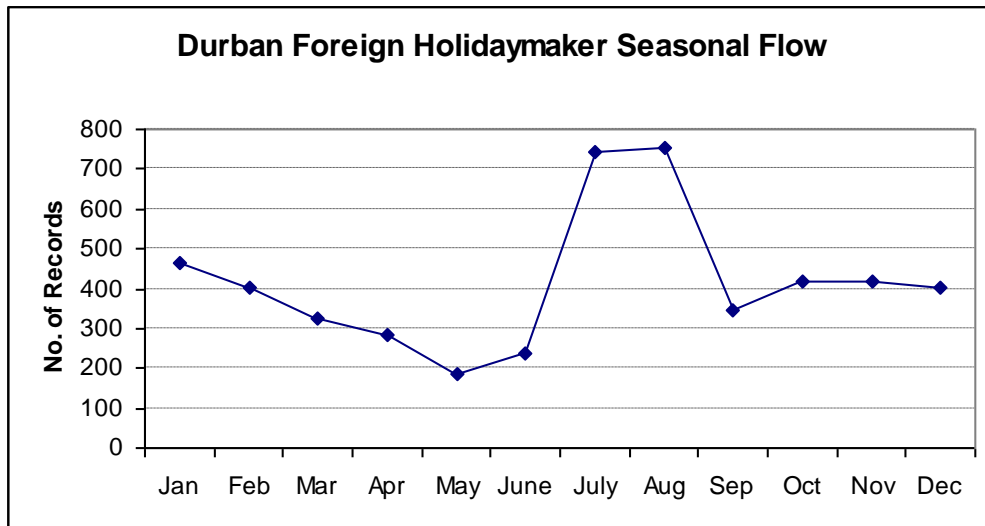
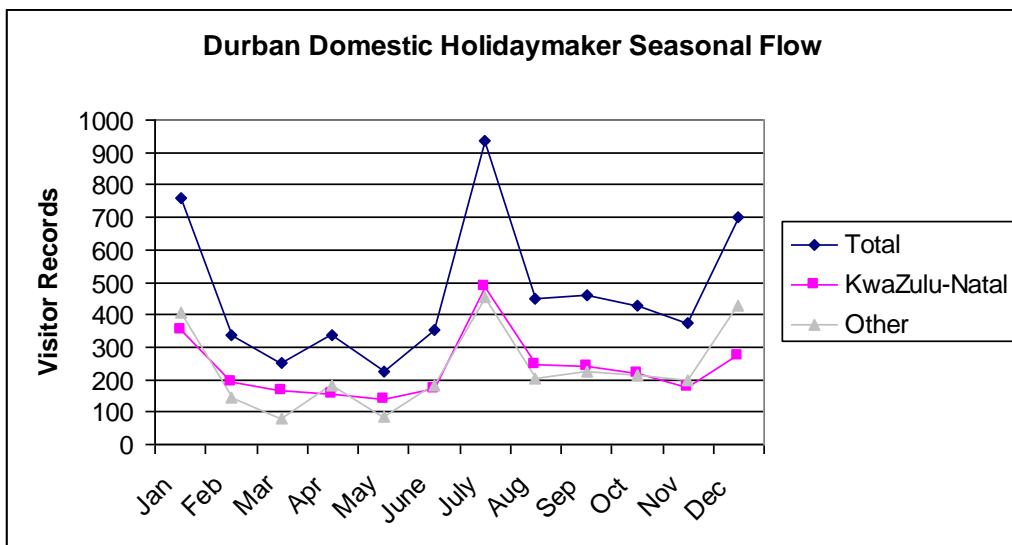


Table 52: Seasonality of Domestic Holidaymakers to Durban



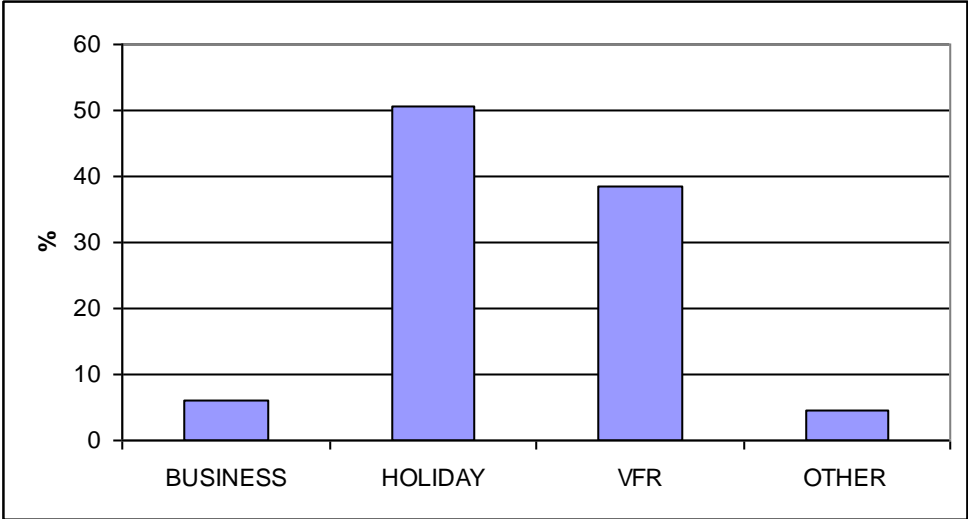
The visitor patterns of holidaymakers to Durban closely follow the patterns of other areas of the province, with high numbers in summer and the middle of winter – for similar reasons as for the other areas – and lower numbers during the shoulder seasons. There are smaller peaks with the domestic markets during school holidays, and a significant July/August peak with the foreign visitors, possibly to enjoy warm but not uncomfortably hot weather here. Again, efforts need to be made by marketing campaigns to target the troughs and so to attempt to increase numbers of visitors during those times.

4.7 Pietermaritzburg and Midlands

Table 53: Pietermaritzburg and Midlands Respondents by Purpose of Visit – September 2004

| Purpose | Total | % |
|--------------|--------------|---------------|
| Business | 1516 | 6.21 |
| Holiday | 12352 | 50.58 |
| VFR | 9412 | 38.54 |
| Other | 1143 | 4.68 |
| Total | 24423 | 100.00 |

Table 54: Pietermaritzburg and Midlands Respondents by Purpose of Visit – September 2004



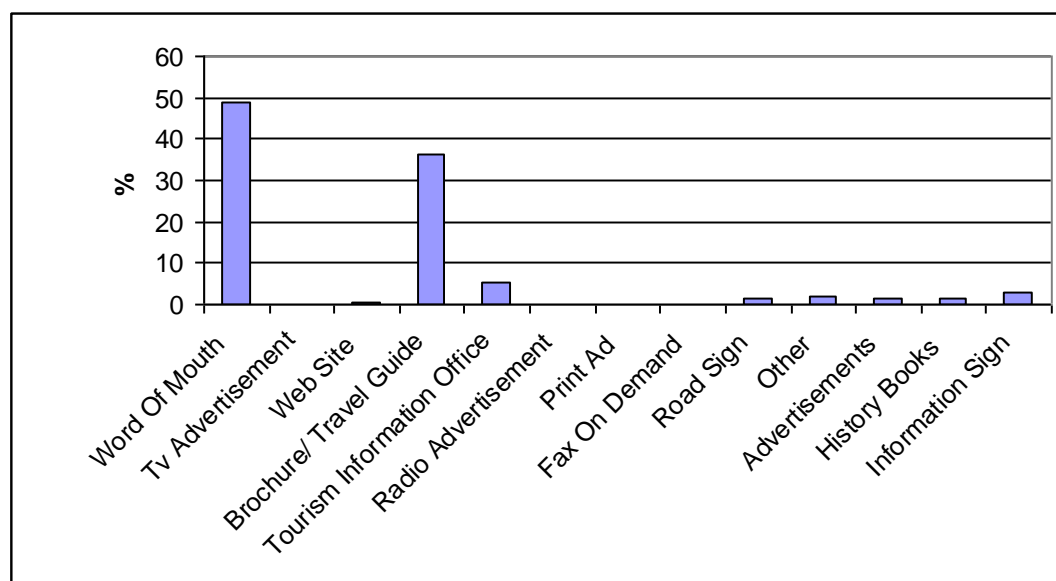
A large percentage of visitors to the Pietermaritzburg and Midlands area were there for the purposes of having a holiday – over 50%. However, it was interesting to note the significant numbers of people who also visited the area for the purposes of seeing friends and relatives – just over 38% of the total. This is quite a different profile of visitors from those of the other

regions, and an indication that the advertising and marketing strategies of the Pmb region needs to be rather different from those of the other regions also.

Table 55: Pietermaritzburg and Midlands Respondents by Media – September 2004

| Media | Total | % |
|----------------------------|--------------|---------------|
| Word Of Mouth | 10806 | 48.99 |
| Tv Advertisement | 5 | 0.02 |
| Web Site | 80 | 0.36 |
| Brochure/ Travel Guide | 7995 | 36.24 |
| Tourism Information Office | 1170 | 5.30 |
| Radio Advertisement | 6 | 0.03 |
| Print Ad | 10 | 0.05 |
| Fax On Demand | 2 | 0.01 |
| Road Sign | 346 | 1.57 |
| Other | 425 | 1.93 |
| Advertisements | 286 | 1.30 |
| History Books | 267 | 1.21 |
| Information Sign | 661 | 3.00 |
| Total | 22059 | 100.00 |

Figure 56: Pietermaritzburg and Midlands Respondents by Media – September 2004



Word-of-mouth once again had the greatest effect on the decisions made by visitors to explore a particular area or facility, accounting for almost half of the total number of visitors to Pietermaritzburg and the Midlands. Travel guides and travel brochures also had a substantial effect on the decisions made and in terms of increasing awareness of particular facilities and encouraging people to visit them.

Table 57: Pietermaritzburg and Midlands Respondents by Country – September 2004

| Country | Count | % |
|----------------|--------------|----------|
| Algeria | 3 | 0.01 |
| Angola | 8 | 0.03 |
| Antigua | 5 | 0.02 |
| Argentina | 18 | 0.06 |
| Australia | 141 | 0.49 |
| Austria | 34 | 0.12 |
| Bahamas | 7 | 0.02 |
| Belgium | 113 | 0.40 |
| Bermuda | 1 | 0.00 |
| Bolivia | 4 | 0.01 |
| Botswana | 20 | 0.07 |
| Brazil | 9 | 0.03 |
| Burundi | 1 | 0.00 |
| Cameroon | 8 | 0.03 |
| Canada | 86 | 0.30 |
| Chile | 3 | 0.01 |
| China | 9 | 0.03 |
| Colombia | 1 | 0.00 |
| Congo | 2 | 0.01 |
| Czech Republic | 9 | 0.03 |
| Denmark | 37 | 0.13 |
| Egypt | 1 | 0.00 |
| Ethiopia | 4 | 0.01 |
| Finland | 18 | 0.06 |
| France | 129 | 0.45 |
| Gabon | 2 | 0.01 |
| Germany | 533 | 1.87 |
| Greece | 2 | 0.01 |
| Hungary | 10 | 0.04 |
| Iceland | 2 | 0.01 |
| India | 15 | 0.05 |
| Indonesia | 1 | 0.00 |
| Iran | 1 | 0.00 |
| Ireland | 39 | 0.14 |
| Israel | 19 | 0.07 |
| Italy | 45 | 0.16 |
| Jamaica | 1 | 0.00 |
| Japan | 24 | 0.08 |
| Kenya | 21 | 0.07 |
| Korea | 5 | 0.02 |
| Lebanon | 1 | 0.00 |
| Lesotho | 2 | 0.01 |
| Lichtenburg | 1 | 0.00 |
| Malawi | 5 | 0.02 |
| Malaysia | 5 | 0.02 |
| Mauritius | 7 | 0.02 |
| Mexico | 4 | 0.01 |

| | | |
|--------------|--------------|---------------|
| Mozambique | 7 | 0.02 |
| Namibia | 24 | 0.08 |
| Nepal | 1 | 0.00 |
| Netherlands | 303 | 1.06 |
| New Guinea | 1 | 0.00 |
| New Zealand | 29 | 0.10 |
| Nigeria | 2 | 0.01 |
| Norway | 37 | 0.13 |
| Oman | 1 | 0.00 |
| Pakistan | 1 | 0.00 |
| Peru | 1 | 0.00 |
| Philippines | 1 | 0.00 |
| Poland | 12 | 0.04 |
| Portugal | 9 | 0.03 |
| Reunion | 37 | 0.13 |
| Romania | 2 | 0.01 |
| Rsa | 25333 | 88.82 |
| Russia | 11 | 0.04 |
| Saudi Arabia | 15 | 0.05 |
| Scotland | 74 | 0.26 |
| Singapore | 4 | 0.01 |
| Spain | 18 | 0.06 |
| Sri Lanka | 1 | 0.00 |
| Swaziland | 10 | 0.04 |
| Sweden | 41 | 0.14 |
| Switzerland | 45 | 0.16 |
| Taiwan | 2 | 0.01 |
| Tanzania | 6 | 0.02 |
| Thailand | 4 | 0.01 |
| Turkey | 2 | 0.01 |
| Uae | 7 | 0.02 |
| Uganda | 5 | 0.02 |
| Uk | 752 | 2.64 |
| Ukraine | 1 | 0.00 |
| Uruguay | 3 | 0.01 |
| Usa | 256 | 0.90 |
| Venezuela | 1 | 0.00 |
| Yugoslavia | 2 | 0.01 |
| Zambia | 12 | 0.04 |
| Zimbabwe | 32 | 0.11 |
| Total | 28521 | 100.00 |

Visitors to the Pietermaritzburg and Midlands area again mirrored the profile of the other areas, by and large, with the vast majority – almost 88% - originating from within the country. This was again followed by small percentages from the UK and Germany.

Seasonality to the area was also marked, as depicted in the two graphs which follow:

Table 58: Seasonality of Foreign Holidaymakers to Pietermaritzburg and Midlands – September 2004

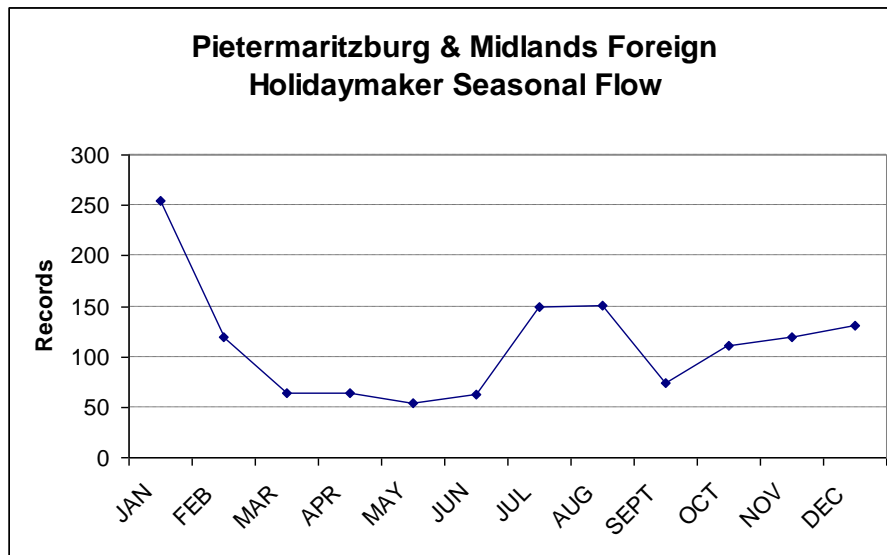
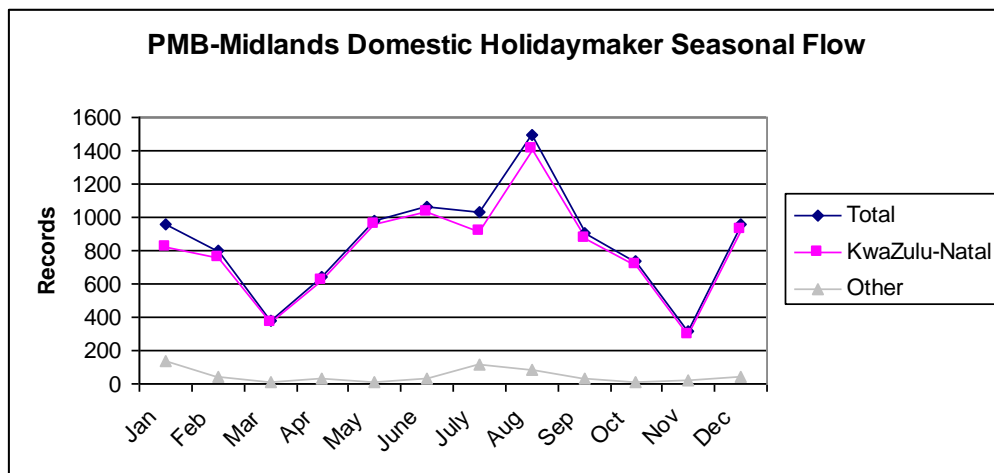


Table 59: Seasonality of Domestic Holidaymakers to Pietermaritzburg and Midlands – September 2004



Although the seasonality patterns for this area are very marked, they also follow the general trend of the other areas of the province. There are high visitor numbers during the two main holiday periods, summer and winter, and smaller numbers in evidence during the 'shoulder' periods. Still, this area shows a rather distinctive pattern of quite a high number of domestic holidaymakers in the May-July period, different from the patterns of other regions, and a much lower July/August foreign visitor peak. Foreign holidaymakers seem to prefer the summer period to visit this area, rather than the winter.

5. Hostel Visitor Books – Respondents

The hostel, youth hostel or backpacker's market is one which global trends indicate is growing. The Australian backpacker market is already worth billions of dollars but the South African sector of this market is still largely an unknown. The KZNTA decided to begin data collection on this market both through its consumer surveys and more recently through the use of Visitor Books designed specifically for hostels. These books work in much the same way as the standard visitor books in that they collect basic data from those who make use of the amenities or facilities where such books are located, they are carbon books providing copies for the facilities' records and copies for the KZNTA to capture in order that the data might be analysed.

The Hostel Visitor Books were initially distributed through the South African Backpackers Association and subsequently directly to each hostel. The first books were distributed during July 2000 which means that over four years of data have been collected to date.

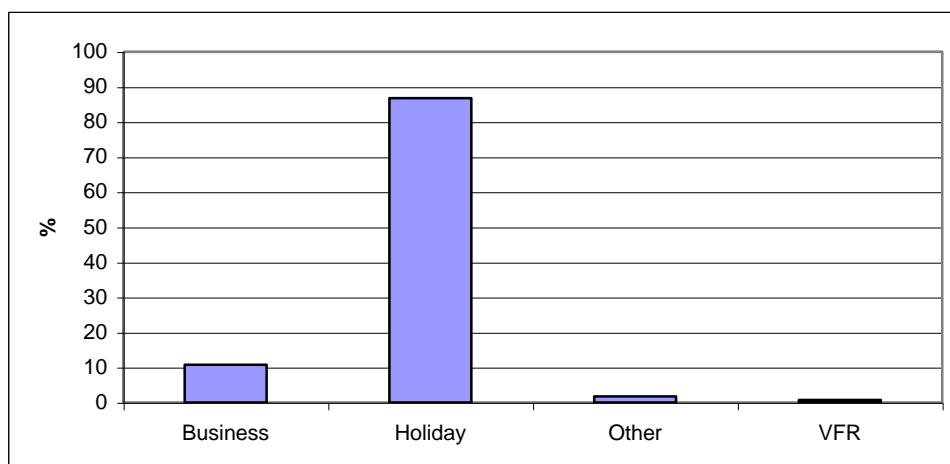
Visitor Books are presently supplied to 30 hostels since the inception of the project. Out of these, sixteen establishments have returned forms so far. Please note that some other hostels have also sent in information but due to the amount of data, not all information has been captured yet, and also that some of the hostels have only recently joined the project.

It was most interesting to note the reasons why tourists who made use of backpacker hostels were visiting KZN and the results are supplied in the table below:

Table 60: Hostel Respondents by Purpose of Visit

| Purpose | Number | % |
|--------------|--------------|---------------|
| Business | 1372 | 10.77 |
| Holiday | 11048 | 86.76 |
| Other | 220 | 1.73 |
| VFR | 94 | 0.74 |
| Total | 12734 | 100.00 |

Figure 61: Hostel Respondents by Purpose of Visit



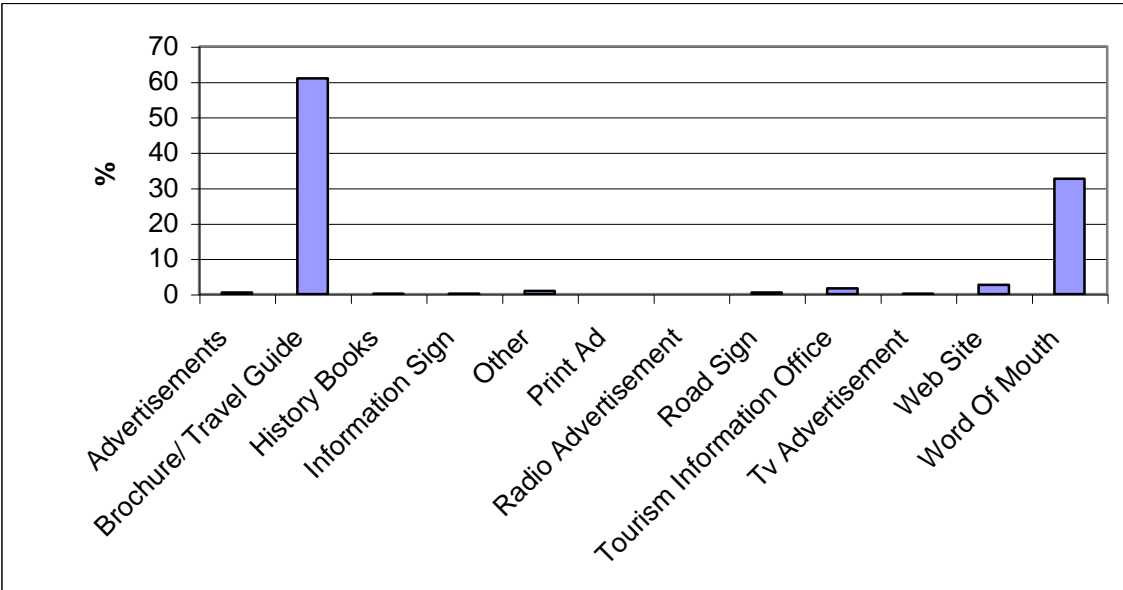
The table and figure above show a very different picture to that developed around respondents who filled in the standard visitors' books. In the case of the Hostel Visitor Books, the vast majority of respondents, as expected, were in the area for a holiday – almost 87% of the total. Very few had undertaken the trip in order to visit friends or relatives and only 11% were here on business. Thus even initial indications are that this is a very different market, a very different type of tourist or traveller to the usual domestic or foreign tourist. These establishments obviously attract a rather different type of traveler, one who may spend smaller amounts per day, but who stay for far longer periods at their destination.

Hostel respondents also used different methods to find out about the various hostels they stayed at and the results of this are shown below:

Table 62: Table Hostel Respondents – How Did You Hear About Us?

| Media | Number | % |
|----------------------------|--------------|---------------|
| Advertisements | 63 | 0.48 |
| Brochure/ Travel Guide | 8023 | 61.01 |
| History Books | 7 | 0.05 |
| Information Sign | 9 | 0.07 |
| Other | 118 | 0.90 |
| Print Ad | 5 | 0.04 |
| Radio Advertisement | 2 | 0.02 |
| Road Sign | 65 | 0.49 |
| Tourism Information Office | 210 | 1.60 |
| Tv Advertisement | 12 | 0.09 |
| Web Site | 348 | 2.65 |
| Word Of Mouth | 4289 | 32.61 |
| Total | 13151 | 100.00 |

Figure 63: Table Hostel Respondents – How Did You Hear About Us?



Information about the various hostels was acquired by the visitors in a variety of ways. According to the data collected, a great deal of the information for hostels was obtained, again somewhat differently from the findings pertaining to those of the standard visitor book respondents, via brochures and travel guides. Over 61% (up from 60% in the last report, 57%, and 54% in the ones prior to that) of the information was obtained in this manner. This **increasing trend of the use of brochures and travel guides** is an important pointer in terms of marketing to this market.

The second most important means of obtaining information was by means of word-of-mouth communication and this accounted for just less 33% of the total, again indicating a continued decrease in the use of this type of communication in terms of its importance in influencing a choice of accommodation type.

Electronic media did not account for very much of the information obtained regarding hostel accommodation although the use of web sites has shown a definite increase in use and importance since the previous two reports.

Visitors making use of hostel accommodation originated from a wide variety of countries. Their origins are shown in the table below.

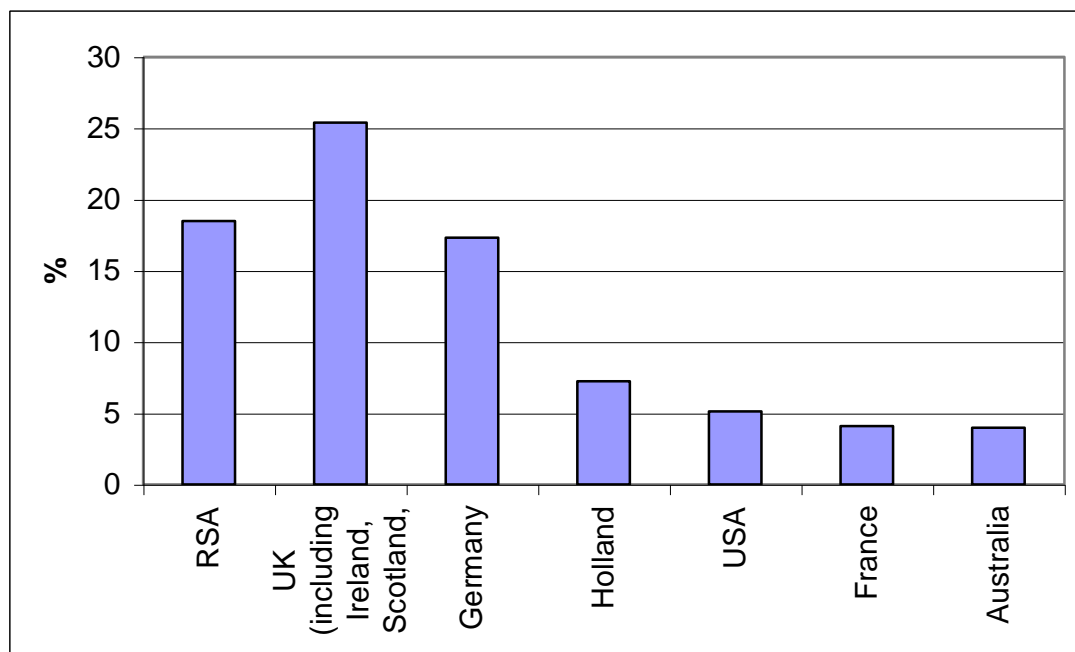
Table 64: Country of Origin – September 2004

| Country | Number | % |
|----------------|--------|------|
| Angola | 4 | 0.03 |
| Argentina | 32 | 0.27 |
| Australia | 480 | 3.98 |
| Austria | 72 | 0.60 |
| Barbados | 4 | 0.03 |
| Belgium | 206 | 1.71 |
| Botswana | 49 | 0.41 |
| Brazil | 14 | 0.12 |
| Burkina Faso | 7 | 0.06 |
| Cameroon | 2 | 0.02 |
| Canada | 238 | 1.97 |
| Canary Islands | 1 | 0.01 |
| Chile | 8 | 0.07 |
| China | 10 | 0.08 |
| Congo Drc | 4 | 0.03 |
| Corine | 1 | 0.01 |
| Costa Rica | 1 | 0.01 |
| Cyprus | 1 | 0.01 |
| Czech Republic | 43 | 0.36 |
| Denmark | 89 | 0.74 |
| Dominican Rep | 1 | 0.01 |
| Egypt | 1 | 0.01 |
| Estonia | 2 | 0.02 |
| Finland | 35 | 0.29 |
| France | 494 | 4.09 |

| | | |
|---------------|------|-------|
| Gabon | 3 | 0.02 |
| Germany | 2089 | 17.31 |
| Ghana | 1 | 0.01 |
| Greece | 3 | 0.02 |
| Holland | 874 | 7.24 |
| Hungary | 4 | 0.03 |
| India | 8 | 0.07 |
| Ireland | 310 | 2.57 |
| Israel | 83 | 0.69 |
| Italy | 102 | 0.85 |
| Jamaica | 1 | 0.01 |
| Japan | 36 | 0.30 |
| Kenya | 5 | 0.04 |
| Korea | 5 | 0.04 |
| Kuwait | 1 | 0.01 |
| Lesotho | 55 | 0.46 |
| Liechtenstein | 1 | 0.01 |
| Madagascar | 1 | 0.01 |
| Malawi | 19 | 0.16 |
| Malaysia | 6 | 0.05 |
| Maldives | 1 | 0.01 |
| Mali | 1 | 0.01 |
| Malta | 4 | 0.03 |
| Mauritius | 4 | 0.03 |
| Mexico | 1 | 0.01 |
| Miami | 1 | 0.01 |
| Morocco | 2 | 0.02 |
| Mozambique | 34 | 0.28 |
| Namibia | 33 | 0.27 |
| New Zealand | 184 | 1.52 |
| Norway | 108 | 0.89 |
| Pakistan | 3 | 0.02 |
| Peru | 2 | 0.02 |
| Philippines | 1 | 0.01 |
| Poland | 11 | 0.09 |
| Portugal | 3 | 0.02 |
| Qatar | 1 | 0.01 |
| Reunion | 58 | 0.48 |
| Rsa | 2230 | 18.48 |
| Russia | 2 | 0.02 |
| Scotland | 103 | 0.85 |
| Singapore | 1 | 0.01 |
| Slovak Rep | 5 | 0.04 |
| Slovenia | 10 | 0.08 |
| Spain | 77 | 0.64 |
| St Helena | 1 | 0.01 |
| Swaziland | 64 | 0.53 |
| Sweden | 172 | 1.43 |
| Switzerland | 201 | 1.67 |
| Tanzania | 3 | 0.02 |

| | | |
|--------------|--------------|---------------|
| Tunisia | 2 | 0.02 |
| Turkey | 4 | 0.03 |
| Uae | 4 | 0.03 |
| Uganda | 3 | 0.02 |
| Uk | 2643 | 21.90 |
| Ukraine | 4 | 0.03 |
| Unterthinzan | 1 | 0.01 |
| Upper Volta | 1 | 0.01 |
| Usa | 619 | 5.13 |
| Venezuela | 1 | 0.01 |
| Wales | 8 | 0.07 |
| West Indies | 1 | 0.01 |
| Zambia | 10 | 0.08 |
| Zanzibar | 1 | 0.01 |
| Zimbabwe | 40 | 0.33 |
| Total | 12069 | 100.00 |

Figure 32: Main Countries of Origin – Hostels, September 2004



Unlike the situation with previous reports, several changes were noted in the last report. Backpackers from within South Africa for the first time did not constitute the greatest number of people using participating backpacker hostels, and this trend can be seen continuing in this report. The largest number of users of these facilities were from the UK, followed by those from Germany. Holland and the USA again provided the next largest numbers of travellers who stay in backpacker hostels followed by those from France and Australia.

The latest consumer surveys show that most of the visitors making use of backpacker hostels were between the ages of 25 and 34, with the next largest group between 16 and 24 years of age. The vast majority of the visitors were out here for a holiday, as is reflected also in the Visitor Book surveys. Most of the foreign visitors were from the UK or Germany with a further 24% from the USA and Canada. Once again, just over 10% were out here on business. And once again, these findings are mirrored by the findings of the Visitor Book survey.

A survey carried out by ACNielsen in December 2001 provides further useful information on the hostel or backpacker market. The survey, *A Survey of the South Africa Foreign Visitor Market January 2001*, states that the Backpackers' Hostels category was a new one added in the winter of 2000 to the survey questionnaire. At the time of the 2001 survey 13.5% of all foreign visitors to South Africa used this form of accommodation, and 4% of all foreign visitors to KZN used this form of accommodation also. Generally, too, visitors rated backpacker hostels as good – although this had decreased from 73% to 69% since the previous year, while the rest rated them as fair.

It should also be noted that the survey indicated a change from the previous report in that more foreign visitors used caravan or camp sites than backpacker hostels – 6% as opposed to 4%.

According to the survey of foreign visitors to KZN in January/February 2001, carried out by the KZNTA, only 2.4% of foreign visitors to KZN made use of backpacker hostels while they were in the province. Although this was quite a reduction from the same time period of the previous year when almost 5% of the total foreign visitors to KZN stayed in backpacker hostels, the numbers had increased to 5.3% by Sept/October 2001. Just over 5% (5.1%) of foreign visitors had stayed in backpacker hostels in September/October 2000. Approximately 86% of visitors who used the hostels rated those facilities as good.

It appears, then, that although backpacker hostels are thought of as highly rated facilities, there has been somewhat of a decline in their ratings by foreign visitors over the past year.

It is also important to consider the domestic market, many of whom also make use of backpacker hostels. During the 2002 survey carried out by ACNielsen, and which ran from October 2001 to September 2002, almost 11% of the total number of visitors to the province went backpack travelling. In comparison, almost 30% of those visiting the province said that although they had not engaged in the activity, they would certainly like to do so.

Another interesting finding of the latest data supplied by backpacker hostel visitor books was that these visitors spend an average of **46 days** in South Africa! This is a significant amount of time, especially when compared with the 10 nights foreign visitors usually spend in the country. Tourists who make use of backpacker facilities, then, are seriously long term visitors.

People using youth or backpacker hostels also spend an average of 18 days in the province, again, an increase over the 13 nights usually spent by foreign visitors here.

All in all then, the stay length of these tourists suggests a significant market, and one which should be protected and increased as much as possible so as to reach its full potential in this province.

6. Conclusions and Recommendations

The Visitor Book survey provides valuable information to the KZNTA, CTOs, museums, art galleries and other participating institutions and facilities in terms of where such visitors obtain the information regarding such establishments. The survey also indicates which information sources influence visitors the most in terms of their decisions to visit a place or facility. Word-of-mouth communication came out strongly as the most important influencing factor once again and cognizance of this fact should be taken into account in any advertising or marketing campaign if it is to be successful. Nevertheless, brochures and tourism pamphlets were shown to be the most important influencing medium – an indication of the importance of the written word for this type of visitor.

Another important finding is the rating of the backpacker or hostel accommodation sector. It appears that these establishments are chosen by people of all ages and from a wide range of countries as the preferred accommodation type. Such facilities have obtained a consistently high rating by tourists who use such types of accommodation. There is a need, and now the possibility, to use the information which has been collected from these establishments for email and direct marketing campaigns to help increase the use of backpacker hostels.

The information collected from the project to date has proved most useful, and the intention is not only to continue with this project but also to expand it to include as many tourism amenities and facilities as possible. Data concerning backpacker hostels is also proving most informative and is beginning to create a basis for an understanding of the functioning of that segment of the accommodation sector.

Besides the specific information such as where visitors obtained their information from, and where they originated, it is important to note the comments of the visitors. On a purely qualitative basis, negative comments, of which there were relatively few, centred around the issues of cleanliness – the place could have been cleaner, the ablution facilities were not clean enough, and the like.

On a very positive note, many of the visitors mentioned the issue of service. Good and hospitable service was commented upon frequently and the Publicity Associations were particularly selected as offering excellent, friendly, polite and hospitable service. The Durban International Airport information office was also singled out for high praise.

Museums and art galleries were generally rated very highly by the visiting public, and the latest data (SAT 2004) indicates that some 60% of foreign air arrival visitors to South Africa who visit KZN make use of museums, art galleries and cultural and heritage sites in the province. This needs to be compared with only 28% of the domestic tourists in the province.

As far as Youth or Backpacker Hostels were concerned, there were very few negative comments, and these mainly centred around the provision of extra information. Such establishments should take note of such comments and make a concerted effort to provide more information to travellers, or be better prepared to direct them to where they might find such information.

Again on a more positive note, three times as many domestic visitors as made use of backpacker accommodation said they would like to do so on a future trip to the province. This is an extremely positive finding for the backpacker market and provides an indication of the potential for such accommodation types. This should also be taken note of by those establishments in terms of their advertising and marketing campaigns.

Appendix 1 – Participating Establishments

The following is a list of all tourism establishments and facilities which were provided with KZN Tourism Authority Visitor Books. Those in bold type indicated the establishments which are already taking part in this process and are sending back the duplicate record copies for capture:

1. **Amanzimtoti Publicity**
2. **Babanango Tourism**
3. **Babanango Hotel**
4. **Balele Resort/ Caravan Park – Utrecht**
5. **Bat Center Trust**
6. **Battlefields Route**
7. **Biyala Game Lodge - defunct**
8. **Baynesfield Estate Museum**
9. **Boston Bulwer Beat**
10. **Bushman’s River Tourism**
11. **Caterpillar Catfish Cookhouse**
12. **Colenso Information Office**
13. **Comrades Marathon Museum**
14. **Dolphin Coast Publicity**
15. **Drostdy Crafts / Paulpietersburg Publicity / Museum**
16. **Duck and Deck Animal Farm**
17. **Duck Inn B&B, Richard’s Bay**
18. **Durban Africa**
19. **Durban Cultural and Documentation Centre**
20. **East Griqualand Museum, Kokstad**
21. **East Griqualand Outdoors Info Center**
22. **Empangeni Art and Cultural History Museum**
23. **Empangeni Tourism Office**
24. **Fort Durnford Museum**
25. **Ghost Mountain Inn**
26. **Greytown Publicity**
27. **Gwahumbe Reserve**
28. **Hibberdene Publicity**
29. **Harry Heine House - defunct**
30. **Hilton Meander**
31. **Himeville Museum**
32. **Hluhluwe Tourism**
33. **Howick Tourism**
34. **Jozini Tourism and Development Association**
35. **Kwadukuza (Heritage KZN-Amafa Akwazulu)**
36. **KwaMuhle Museum**
37. **KwaZulu Cultural Museum – Ondini**
38. **Ladysmith Emnambithi Tourism**
39. **Lucas Mayor Museum**
40. **Macrorie House Museum**

41. Mangosuthu Arts and Crafts
42. Maputaland Publicity
43. Maritime Museum – Port Natal
44. Melmoth Information
45. Midlands Meander Association
46. Mooi River Publicity Association
47. Montrose Tourist Office
48. Mtubatuba Publicity Association
49. Natal Herbarium
50. Natal Museum
51. Natural Science Museum
52. Newcastle Publicity
53. Ncome Museum, Dundee
54. Nieuwe Republiek Museums
55. Nongoma Publicity Association
56. Nottingham Road Publicity
57. Okhahlamba Drakensberg Tourism Association
58. Old Court House Museum
59. Old House Museum
60. Ondini Museum, Ulundi (Amafa)
61. Phezulu Safari Park
62. Pietermaritzburg/Mgungundlovu Tourism
63. Pongola Publicity
64. Hibiscus Coast Port Shepstone
65. Richmond Byrne and District Museum
66. Richmond Community Tourism Organization
67. Rorke's Drift
68. Seaworld/uShaka Marine World
69. Shakaland
70. Southern Drakensberg-Sani Saunter– Himeville
71. Sugar Coast
72. Talana Museum
73. Tatham Art Gallery
74. Thousand Hills Tourism
75. Thukela Biosphere Information
76. Timeless Africa (defunct)
77. Tourism Dundee
78. Tourism KZN (main Durban office)
79. Tourism Margate
80. Tourism Scottburgh/Umdoni Coast and Country
81. Tuzi Gazi Tourism Association – Richards Bay
82. Ulundi Tourism
83. Umgeni River Bird Park
84. Umgeni Valley Reserve
85. Umlalazi Tourism
86. Umtamvuna/Hibiscus Coast Port Edward
87. Utrecht Museum
88. Utrecht Publicity

- 89. Uvongo Bird Park**
- 90. Voortrekker Museum**
- 91. Vukani Museum**
- 92. Vryheid Information Bureau**
- 93. Winterton Publicity**
- 94. Zululand Historical Museum**

- 95. Albert Falls Amble
- 96. Bayside Gallery
- 97. Butterflies for Africa
- 98. Cathkin Park Office (Drakensberg Tourism)
- 99. Colgray Crafts
- 100. Crocodile Creek
- 101. Dumazulu
- 102. Earthnic Tours
- 103. Emolweni (Tugela River Mouth)
- 104. Gailforce Tours and Transfers
- 105. Glencoe Information
- 106. Inanda Community Tourism Association
- 107. Inanda Heritage Route
- 108. Imvubu Lodge
- 109. Ixopo Tourism
- 110. Jenny's B&B, Melmoth
- 111. Jewel of the North, Mandini
- 112. Kamberg Valley Tourism
- 113. Kambula Lodge
- 114. King Prawn
- 115. Lilani Hot Springs
- 116. Lobotes Caravan Park
- 117. Minitown
- 118. Mount Currie Inn
- 119. NSA Gallery
- 120. Richard's Bay Lodge
- 121. Riverbend Crocodile Farm
- 122. Sakabula Circuit
- 123. Sanibonani, Africa
- 124. Seabreeze, Mandini
- 125. Spionkop Lodge
- 126. St Lucia Tourism Association
- 127. Thukela View Chalets
- 128. Tortoise Preservation Trust
- 129. Tugela Caravan Park
- 130. Twin Palms, Mandini
- 131. Umkomaas White Water Rafting
- 132. Ushaka Marine World Information Office
- 133. Wetlands Letting
- 134. Zululand Birding Route Info Office

Appendix 2 – Participating Visitor Hostels

The following is a list of all Visitor Hostels which were sent KZN Tourism Authority Hostel Visitor Books. Those in bold type indicated the establishments which are taking part in this process. Please note that information from all of the participating hostels may not yet have been captured even if the visitor book information pages have been returned.

- 1. African Tale Backpackers**
- 2. Ansteys Beach Backpackers**
- 3. Beach Bums**
- 4. Bibs St Lucia**
- 5. Cuckoo's Nest**
- 6. Durban Beach Youth Hostel**
- 7. Hippo Hide**
- 8. Home Backpackers**
- 9. Inkosana Lodge**
- 10. Isinkwe**
- 11. Kuboboyi River Lodge & Backpackers**
- 12. Margate Backpackers**
- 13. Mitchell Park Budget Travellers Haven**
- 14. Sunduzi**
- 15. Travellers International Lodge**
- 16. Zululand Backpackers, Eshowe**

17. African Wanderers
18. Angle Rock
19. Amphitheater
20. Banana Backpackers
21. The Beach
22. Camp Buffalo
23. Crossways
24. Dolphin and Whale
25. Ecoethekwini Tours
26. Forest Lake Backpackers
27. Hawk's Nest
28. Ifafa Beach Backpackers
29. Khotso BP, Underberg
30. Khumbulani Lodge
31. Mangosuthu Backpackers Huts
32. Mnweni Hiking Center
33. Nomads
34. Old Mill and Bridge
35. Prince Alfred St BP
36. Rylie Hill
37. Smith's Cottage
38. Tekweni
39. Umphiti BP
40. Warner Beach Backpackers

