



## Tourism KwaZulu-Natal Statistics Report

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Tourism KwaZulu-Natal

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## DISCLAIMER

It is important to note that this 2021 TKZN Statistics Report has missing data, when compared to previous years' reports and Statistics Brochures. The reason for this is that the COVID-19 pandemic has not only had a devastating impact on the tourism sector, but it has also disrupted the collection of tourism data, especially in the context of South Africa and KZN.

At the time of publication, some of the sections that are usually included in the report were omitted as the data was unavailable. This missing data, when available, will be added to the report and an amended version will be published accordingly.

For any statistical related queries, please contact:

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## Statistics for the Tourism Sector (2020)

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

### Global Foreign Tourism Market 2020

	World	Africa	South Africa	KZN
Size	381 mn <sup>1</sup>	18.1 mn <sup>1</sup>	2.8 mn <sup>3</sup>	±225 667 (±*)
Growth (%)	-74% <sup>1</sup>	-75% <sup>1</sup>	-72.4% <sup>3</sup>	-71.8% <sup>3</sup>
Direct Spend (Tourism Receipts)	U\$533bn <sup>1</sup>	U\$13.6bn <sup>1</sup>	R22.3bn <sup>3</sup>	R1.8bn <sup>3</sup>
Daily Spend			R724 <sup>3</sup>	R651 <sup>3</sup>
Average Stay (nights)			11.0 nights <sup>3</sup>	9.4 nights <sup>3</sup>

[Source: UNWTO 2021 September Barometer<sup>1</sup>, WTTC<sup>2</sup>, SAT<sup>3</sup>]

### Global Tourism Contribution 2020

	World	Africa	South Africa	KZN
Directly Employed				±79 393 <sup>***</sup>
Total Employed	272mn <sup>*</sup>	17.5mn <sup>*</sup>	±987 400 <sup>*</sup>	±155 591 <sup>***</sup>
Total Contribution to GDP %	5.5% <sup>*</sup>	±3.7% <sup>*</sup>	±3.7% <sup>*</sup>	±1.8% <sup>#</sup>
Direct Contribution to GDP (Foreign + Domestic)	US\$2.9tr <sup>*</sup>	U\$63.0bn <sup>*</sup>	±R75.4bn <sup>**</sup>	±R11,9bn <sup>***</sup>
Total Contribution to GDP (Foreign + Domestic)	U\$4.7tr <sup>*</sup>	U\$85.7bn <sup>*</sup>	±R182.5bn <sup>*</sup> (U\$11.1bn)	±R13,7Rbn <sup>^</sup>

[Source: WTTC 2021\*, SAT\*\*, TKZN\*\*\*, Stats SA\*\*\*\* derived from GDPR for KZN Current Prices - domestic and international<sup>†</sup> STATSSA derived from GDPR for KZN Constant Prices, ^using multiplier of 2, #IHS Global Insight]

Global Tourism: Top 10 Spenders in 2020 (US\$ billion)	
1. China	44.6
2. USA	42.2
3. France	32.5
4. Germany	22.5
5. Italy	19.8
6. Spain	19.6
7. Thailand	14.9
8. Austria	13.5
9. Turkey	13.5
10. UAE	13.2

[Source: WTTC 2021]

## South Africa

### The South African Foreign Picture 2020:

**Number of Foreign Arrivals:** 2.8mn (decline of 72.4%)

**Spend (pppd):** R724

**Total Spend:** R22.3bn

**Average length of stay:** 11.0 nights

**Main overseas source markets:** UK, USA, Germany, France, Netherlands

**Spend Proportion:** Foreign vs Domestic = 67% vs 33%\*

[Source: SAT 2021, \*WTTC]

### South Africa's Regional Tourist Markets 2020 (Actual & Share):

	Arrivals	Share
1. Africa	2 152 687	75.6%
2. Europe	447 784	15.9%
3. Americas	120 267	4.3%
4. Asia	57 794	2.0%
5. Australasia	24 701	0.9%
6. Middle East	12 420	0.4%

[Source: SAT 2021]

### South Africa's Top 5 Overseas (Long Haul) Tourist Markets 2020:

1. UK	123 384
2. USA	71 959
3. Germany	106 092
4. France	41 023
5. Netherlands	35 026

[Source: SAT 2021]

### South Africa's Top 10 average spending global markets per trip (excluding capital expenditure)

1. Democratic Republic of Congo	R28 700
2. 'Other' Australasia*	R28 500
3. Switzerland	R26 600
4. Finland	R25 100
5. Netherlands	R24 900
6. Singapore	R24 600
7. Uganda	R24 400
8. Nigeria	R24 300
9. USA	R23 300
10. 'Other' Europe	R23 100

[Source: SAT 2021] [\*Other Australasia – excluding New Zealand and Australia]

**Purpose of Visit to South Africa (All Foreign Tourists) 2020:**

VFR	41.1%
Holiday	16.4%
Shopping Personal	12.3%
Shopping Business	12.1%
MICE	3.9%
Business Travel	3.9%

[Source: SAT 2021]

**Age Groups (All Foreign Tourists) 2020:**

18-24	16%
25-30	21%
31-34	14%
35-40	17%
41-50	15%
51-60	7%
60+	4%

[Source: SAT 2021]

**Number of Visits to South Africa (All Foreign Tourists) 2020:**

First Time	15%
2-3 Times	11%
4-9 Times	16%
10 or more	30%
Unsure	29%

[Source: SAT 2021]

**South Africa's Annual Overseas (Long Haul) Visitor Arrivals (1980-2020):**

1980: 404 391  
1981: 446 112  
1982: 389 155  
1983: 405 414  
1984: 454 880  
1985: 405 597  
1986: 297 060  
1987: 339 307  
1988: 388 102  
1989: 472 076  
1990: 498 712  
1991: 521 257  
1992: 559 913  
1993: 618 508  
1994: 704 630  
1995: 1 071 839  
1996: 1 172 394  
1997: 1 273 936  
1998: 1 428 401

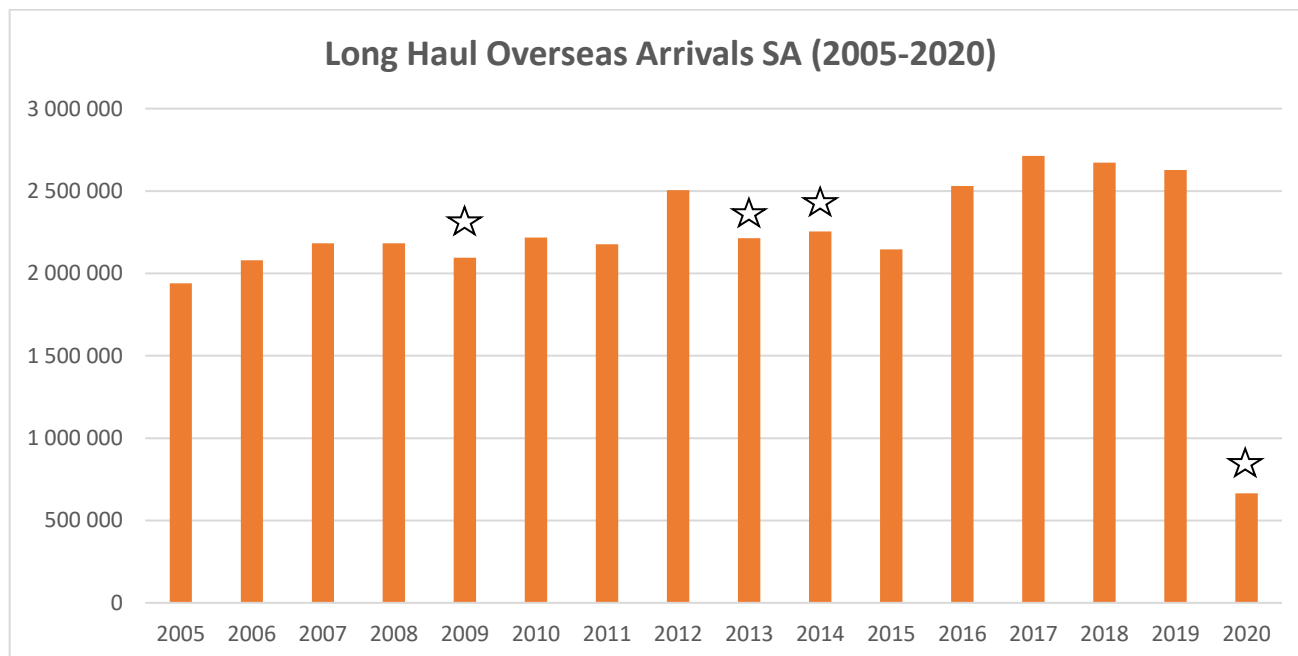
**1999:** 1 491 059  
**2000:** 1 517 768  
**2001:** 1 502 090  
**2002:** 1 803 887  
**2003:** 1 879 110  
**2004:** 1 884 336  
**2005:** 1 939 214  
**2006:** 2 078 704  
**2007:** 2 183 319  
**2008:** 2 182 130  
**2009:** 2 095 325<sup>#</sup>  
**2010:** 2 216 994  
**2011:** 2 176 179  
**2012:** 2 505 762  
**2013:** 2 213 134<sup>\*</sup>  
**2014:** 2 254 709<sup>\*</sup>  
**2015:** 2 144 988  
**2016:** 2 531 046  
**2017:** 2 713 133  
**2018:** 2 672 146  
**2019:** 2 627 750  
**2020:** 664 796<sup>^</sup>

[Source: SAT 2021]

<sup>#</sup>Methodology change, day visitors now omitted from totals

<sup>\*</sup>Methodology change, transits now omitted from totals

<sup>^</sup>COVID-19 pandemic



[Source: SAT 2021, <sup>#</sup>2009: Methodology Change (day visitors now omitted from totals), <sup>\*</sup>2013/2014: Methodology Change (day visitors and transits now omitted from totals), and <sup>^</sup>2020: major decline in arrivals due to the COVID-19 pandemic]

## The South African Domestic Tourism Picture 2020:

**Number of Trips:** 17.0mn trips / ±15.6mn travellers (decline of 40.1%)

**Spend (per trip):** ±R3 118 or ±R945 per day

**Spend (total market value):** R53.1bn direct spend

**Average length of stay:** 3.3 nights

**Main source markets:** Gauteng, KZN, E Cape, W Cape.

[Source: SAT 2021]

### Purpose of Trip (All Domestic Tourists) 2020:

VFR	48%
Holiday	23%
Religious	5%
MICE	5%
Medical	2%

[Source: SAT 2021]

### Top 5 South African Domestic Tourism Source Markets 2020:

1. Gauteng	3.6mn
2. KwaZulu-Natal	3.4mn
3. Eastern Cape	2.1mn
4. Western Cape	1.9mn
5. North West	1.5mn

[Source: SAT 2021]

## KwaZulu-Natal

### KwaZulu-Natal - The Foreign Tourist Picture 2020:

**Number of Visitors:** ± 225 667

**Average Spend (pppd):** R724 per day

**Spend (Total Market Value):** R1.8bn

**Main Overseas Source Markets:** UK, Germany, USA, France, Netherlands

[Source: SAT 2021]

### KwaZulu-Natal's Top Ten Foreign Tourism Source Markets 2020

Source Country	Arrivals	Share (%)	Growth (%)
1. Swaziland	71 340	33.0%	-76.6%
2. Zimbabwe	18 114	8.4%	-66.1%
3. UK	16 442	7.6%	-69.4%
4. Lesotho	14 952	6.9%	-62.7%
5. Germany	14 202	6.6%	-63.9%
6. Botswana	11 087	5.1%	-68.1%
7. Zambia	8 135	3.8%	-71.5%
8. USA	7 962	3.7%	-69.4%
9. France	6 819	3.2%	-72.9%
10. Netherlands	4 368	2.0%	-71.6%

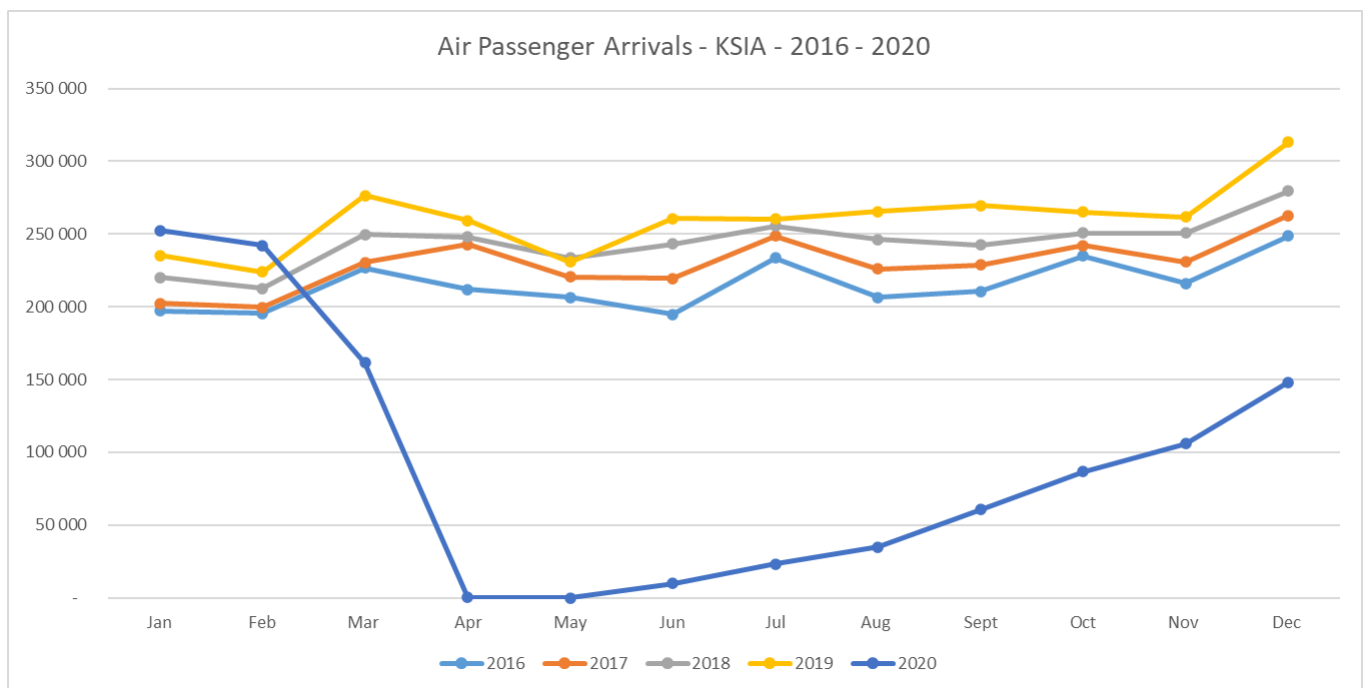
[Source: SAT 2021]

### KwaZulu-Natal's Top 6 Long Haul Source Markets (2016-2020)

2020	2019	2018	2017	2016
1. UK	1. UK	1. UK	1. UK	1. Germany
2. Germany	2. Germany	2. Germany	2. Germany	2. UK
3. USA	3. USA	3. USA	3. USA	3. USA
4. France	4. France	4. France	4. France	4. Netherlands
5. Netherlands	5. Netherlands	5. Netherlands	5. Netherlands	5. France
-	6. Australia	6. Australia	6. India	6. India

[Source: SAT 2021]

### Monthly Air Passenger Arrivals to KZN (2017-2020)



[Source: ACSA 2020]

### KZN - The Domestic Tourist Picture 2020

**Number of Trips:** ±3.8mn trips (decline of 38.5%)

**Average spend per trip:** ±R3 118 or ±R945 per day

**Spend (Total Direct Value):** ±R11.9bn

[Source: SAT 2021]

### KZN: Top 5 Domestic Source Markets and Trips 2020

Source Province	No. of Trips
1. KZN	1.9
2. Free State	1.7
3. Gauteng	1.4
4. Eastern Cape	1.3
5. Mpumalanga	1.2

[Source: TKZN Omnibus Study 2021]



## KZN: Top Source Markets for Holiday Makers 2020

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

[Source: TKZN Omnibus Study 2021]

## Purpose of Visit to KZN (All Domestic Visitors) 2020

Purpose	Share of Trips (%)
Holiday / Leisure	62%
VFR	20%
Business	7%
Events	6%
Other	5%

[Source: TKZN Omnibus Study 2021]

## Time of Visit (Months) 2020:

Month	% of Trips
January	13%
February	11%
March	4%
April	2%
May	2%
June	4%
July	2%
August	2%
September	5%
October	7%
November	12%
December	36%

[Source: TKZN Omnibus Study 2021]

## Activities Undertaken in KZN (All Domestic Visitors) 2020:

Activity	%
Go to the beach	66%
Visit an African township or culture village on a tour	47%
Visit a museum, art gallery or historic building	46%
Food and wine fair	45%
Visit a health spa	41%
Visit a nature or wildlife or game reserve	40%
Take part in any other special activity	37%
Go to a live show, theatre or concert	35%
Visit an arts or craft outlet	31%
Watch a live sport event	29%
Go hiking or mountain climbing	26%
Art and crafts festival	26%
See bushman paintings	24%
Bird watching	23%

Attend conference workshop or training season	21%
Horse riding	21%
Tour of the battlefields	20%
Take part in any water sport	19%
Mountain biking or other cycling	19%
Take part in a sports event	17%
Go backpack/hostel travelling	17%
Fly-fishing or other fishing	14%

[Source: TKZN Omnibus Study 2021]

### Average Trips to Destinations in 2020:

KZN – 1.42

No. of Trips	Share (%)
1 Trip	76%
2 Trips	15%
3 Trips	5%
4 Trips	2%
5 Trips	2%
6+ Trips	1%

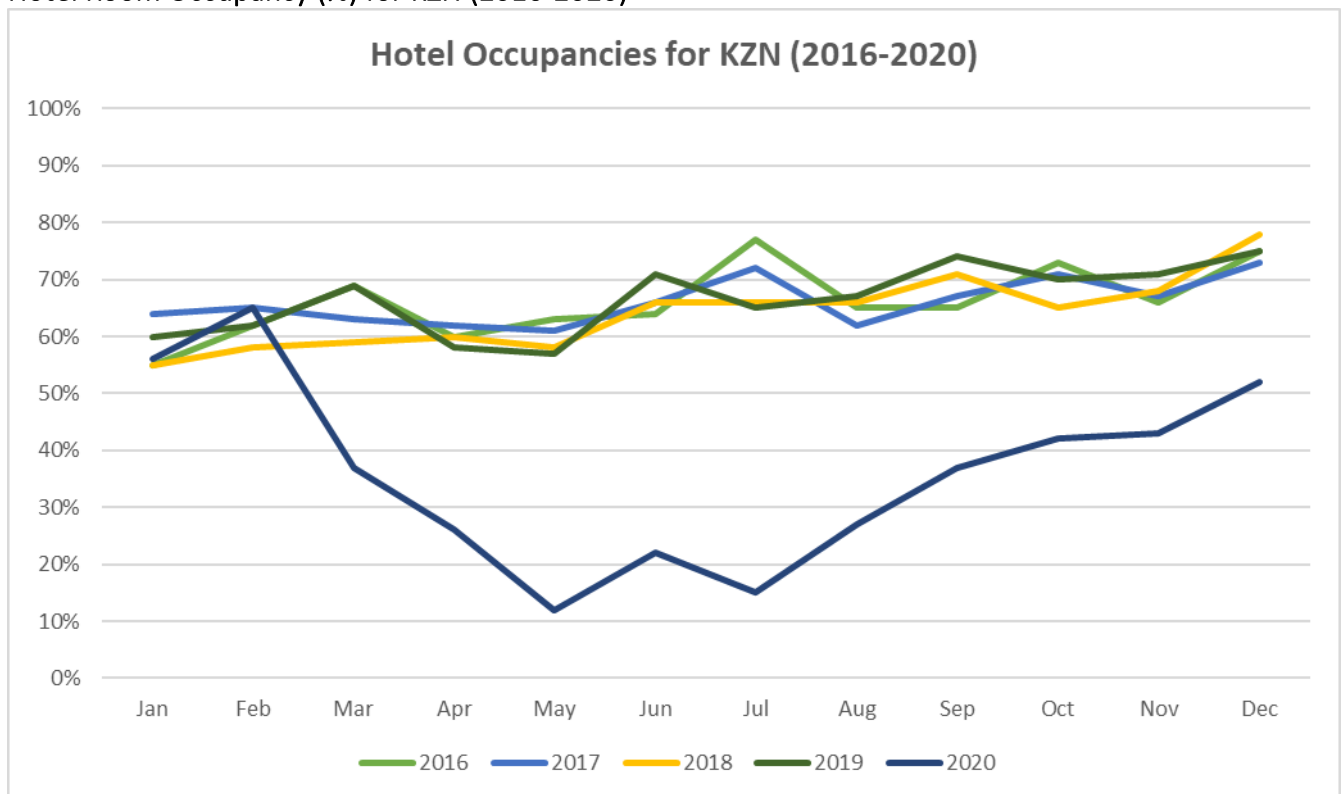
[Source: TKZN Omnibus Study 2021]

### Domestic Trips to Destinations in KZN 2020:

Destination	Share (%)
Durban	50%
Zululand	16%
South Coast	12%
PMB / Midlands	6%
Battlefields	6%
Elephant Coast	5%
North Coast	4%
Drakensberg	2%

[Source: TKZN Omnibus Study 2021]

### Hotel Room Occupancy (%) for KZN (2016-2020)



[Source: STR Global 2020/21]

### Accommodation Types (All Domestic Visitors) 2020:

Accommodation	% share
VFR*	33%
Hotel	20%
Self-Catering	17%
B&B / Guest House/ Country House	16%
Game Lodge	11%
Airbnb	1%
Backpacker / Hostel	0%
Caravan and Camping	0%

[Source: TKZN Omnibus Study 2021] // \*VFR = Visiting Friends and Relatives

### Number of Nights in KZN (All Domestic Visitors) 2020:

Number of Nights	% share
Day Trip	3%
1 Night	15%
2 Nights	23%
3 Nights	19%
4 nights	18%
5 Nights	11%
6 Nights	3%
7 Nights	3%
8 Nights	1%
9 Nights	0%
10+ Nights	4%

[Source: TKZN 2019 (Omnibus Study 2021)]

### KwaZulu-Natal Supply Statistics 2020

Supply Category	No.
Hotels	248
Guest Houses	308
Lodges	197
Bed and Breakfasts	586
Caravan and Camping Sites	84
Self-Catering	629
Youth Hostels/Backpackers	27
Conference Venues	322
Tourist Guides	1 477

[Source: TKZN 2021]

## KZN's International and Domestic Segmentation 2014-2020

Market	Geographic Scope				Target Segments	Core Experiences
Domestic	<ul style="list-style-type: none"> <li>• KZN</li> <li>• Gauteng</li> <li>• Western Cape</li> <li>• Eastern Cape</li> <li>• Free State</li> </ul>				<ul style="list-style-type: none"> <li>• New Horizon families</li> <li>• High-life enthusiasts</li> <li>• Well-to-do Mzansi families</li> <li>• Spontaneous budget explorers</li> <li>• Seasoned leisure seekers</li> </ul>	<ul style="list-style-type: none"> <li>• Beaches</li> <li>• Natural beauty</li> <li>• Nightlife</li> <li>• Shopping</li> <li>• Heritage</li> <li>• Culture</li> </ul>
SADC Rest of Africa	<ul style="list-style-type: none"> <li>• Swaziland</li> <li>• Lesotho</li> <li>• Botswana</li> <li>• Mozambique</li> <li>• Zambia</li> <li>• Zimbabwe</li> </ul>	<ul style="list-style-type: none"> <li>* Kenya</li> <li>* Nigeria</li> <li>* Angola</li> </ul>			<ul style="list-style-type: none"> <li>• Business professionals</li> <li>• Traders</li> </ul>	<ul style="list-style-type: none"> <li>• Shopping</li> <li>• Big cities</li> <li>• Beaches (not coastal markets)</li> <li>• Wildlife</li> <li>• Heritage</li> </ul>
Europe Americas Asia	<u>Core</u>	<u>Opportunity</u>	<u>Investments</u>	<u>Strategic Hub</u>		
	<ul style="list-style-type: none"> <li>• United Kingdom</li> <li>• USA</li> <li>• Germany</li> </ul>	<ul style="list-style-type: none"> <li>• France</li> <li>• Netherlands</li> <li>• Australia</li> </ul>	<ul style="list-style-type: none"> <li>• India</li> <li>• China</li> <li>• Brazil</li> <li>• Sweden</li> <li>• Eastern Europe (Russia)</li> </ul>	<ul style="list-style-type: none"> <li>• Middle East (GCC countries)</li> </ul>	<ul style="list-style-type: none"> <li>• NSSA, Wanderlusts</li> <li>• Family explorers</li> <li>• New beach lovers</li> </ul>	<ul style="list-style-type: none"> <li>• Natural beauty</li> <li>• Wildlife</li> <li>• Culture</li> <li>• Visiting mountains</li> <li>• Beach</li> <li>• Adventure (USA Wanderluster)</li> </ul>

[Source: TKZN 2017]

## KZN Provincial Information

<b>Area</b>	94 361 km <sup>2</sup> (7.7% of South Africa)
<b>Coastline</b>	560kms
<b>Climate</b>	Sub-tropical. Summer 17-28 °C, Winter 11–25 °C, Durban average rainfall 1 009mm
<b>Highest Elevation</b>	3 451 m (Mafadi, in the Drakensberg)
<b>Population</b>	As of 2016 - 11.1mn (19.8% of South Africa) (growth rate 1.6%) Estimated population for 2020 – 11.5mn
<b>Population Density</b>	±100 people per square kilometre (km <sup>2</sup> )
<b>Capital</b>	Pietermaritzburg
<b>Languages</b>	Mainly Zulu and English
<b>Holidays</b>	1 January, 21 March, 24 March, 27 April, 28 April, 1 May, 2 May, 16 June, 9 August, 24 September, 16 December, 25 December, 26 December.
<b>Time Zone</b>	GMT +2
<b>Currency</b>	The Rand made up of 100 cents
<b>GDP Contribution</b>	16% of South Africa's GDP* [second after Gauteng (34%)]
<b>Electricity</b>	220 Volts
<b>Harbors</b>	Durban, Richards Bay
<b>Airports</b>	King Shaka International Airport, Oribi, Richards Bay, Margate, Ulundi.
<b>Literacy Rate</b>	80.2% (2016)
<b>Employment rate*</b>	Between 59.3% - 76.1% (2016, using strict and expanded definitions)

[Source: TKZN, IHS, STATSSA, KZN Provincial Treasury\*, Quantec\*\*]



<b>iSimangaliso Wetland Park, a World Heritage Site</b>	
<b>Location</b>	North-eastern coast of KwaZulu-Natal, South Africa
<b>Date of Inscription</b>	December 1999
<b>Criteria</b>	Unique ecological processes, superlative natural phenomena, biodiversity
<b>Size</b>	332 000 ha, 220 kms of coastline
<b>Highest Elevation</b>	Mt Tabor 130m on the Eastern Shores coast, Nyathikazi 159m on the northern coast, Maphelane sand dune 183m, oKhombe 474m and Lebombo Mountains 776m
<b>Brief description</b>	Three major lake systems, 8 interlinking ecosystems, 700-year-old fishing traditions, Africa's largest estuarine system, 25 000 year old coastal dunes, 220km of coastline, coral reefs, salt and fresh water marshes, coastal grasslands, forested dunes, both tarred and gravel roads
<b>Climate</b>	Sub-tropical. Summer 17-28 °C, Winter 11 – 25 °C, average rainfall 650-800mm inland, 1200-1300mm on the coast.
<b>Facilities</b>	15 741 beds in and around iSimangaliso Wetland Park (this includes St Lucia, Western Shores, Eastern Shores, uMkhuze, Sodwana Bay, Kosi Bay and Hluhluwe/Mtubatuba) The types of accommodation facilities available in and around the park: 11 hotels, 22 guesthouses, 39 B&Bs, 80 huts/chalets/lodges, 67 holiday flats/self-catering and 21 caravan/camping. Other tourist facilities include boat launch sites, picnic sites, bird and game viewing hides and boardwalks (including two aerial platforms).
<b>Activities</b>	Game drives (self-drive and guided), horse rides, fishing (includes deep sea charters), guided natural and cultural walks, turtle tours, whale watching, birdwatching, estuary boat cruises, scuba diving, snorkelling, kayaking.
<b>Visitor Numbers</b>	Annual total 2015: ±500 000
<b>Animal Species / Numbers</b>	Total species: over 6500 plant and animal species, of which there are 110 terrestrial mammals, 22 marine mammals, 128 reptiles and 50 amphibians Big 5: elephant, white and black rhino, buffalo, lion, leopard  Other notable wildlife: 1700 crocodiles and 1600 hippos, giraffe, oribi, kudu, zebra, wildebeest, wild-dog, hyena, cheetah  Insect species include: 282 butterfly, 38 dragonfly and damselfly, 52 fruit chafer beetle, 5 scorpions, and 228 spider species  Notable marine species: leatherback turtles, loggerhead turtles, plus whales, dolphins, 129 corals, 991 ocean fish, 212 estuarine fish, 48 freshwater fish species, 812 marine molluscs and 20 sponges.
<b>Bird Species / Numbers</b>	525 bird species, including Fish eagle, Pelican, Rufous bellied heron, Saddle-billed stork, Flamingo, Crested guinea fowl, Southern banded snake-eagle, Mangrove kingfisher, Neergaard's sunbird, Livingstone's turaco, Lesser Jacana, Pink-throated twinspace, Rosy-throated longclaw
<b>Other</b>	2 185 vascular plants; 325 seaweeds

[Source: iSimangaliso 2017]

<b>uKhahlamba Drakensberg Park World Heritage Site</b>	
<b>Location</b>	Forms western KwaZulu-Natal border between S A and Lesotho, major watershed
<b>Date of Inscription</b>	November 2000
<b>Criteria</b>	Cultural (3) and natural (4) criteria
<b>Size</b>	242 813ha
<b>Highest Elevation</b>	3 451 m
<b>Brief description</b>	High basalt mountain range overlying sandstone bands over shale, foothills, incised valleys, grassland and protea, yellowwood and bottlebrush forests.
<b>Climate</b>	Summer 22 °C, winter 5 °C, average rainfall 900mm, frequently snow in winter
<b>Facilities</b>	700 beds inside the park, 2 000 closely adjacent, 9 campsites, ±150 caves, picnic sites, view sites, vultures' 'restaurant'
<b>Activities</b>	Walking, hiking, climbing, ice climbing, bird watching, fly fishing, paragliding, mountain biking, hand gliding, horse riding, horse trekking, river swimming, rock art viewing, picnicking
<b>Visitor Numbers</b>	Annual total 2015: ±105 578
<b>Animal Species / Numbers</b>	Mammals: 48 species including eland, water buck, oribi, mountain reed buck, ±1800 rhebok, jackals, leopard. Insects include 46 species of millipedes and centipedes, 44 dragonfly species (about a third of South Africa's total) and 74 butterfly species, 124 frog species 23 lizard and 25 snake species.
<b>Bird Species / Numbers</b>	Total: 296 species, including Lammergeyer, Cape vulture, black eagles
<b>Other</b>	2 153 plant species

[Source: TKZN 2017]