

KwaZulu-Natal's Domestic Tourism Market Changes – Anyone for the Beach?

Tourism KwaZulu-Natal Occasional Paper No. 88
February 2012

1. Introduction

The management of Tourism KwaZulu-Natal (TKZN) have decided to issue occasional papers to the tourism trade on the core findings of its research and other projects. The purpose of these papers is to stimulate more debate regarding the findings or progress of such projects, as well as to ensure wider awareness of key research findings.

The tourism arena has seen dramatic changes through time and KwaZulu-Natal (KZN), is no exception. KZN, however, is in the happy position of being located on the warm, east coast of South Africa, as well as being within easy driving distance of the largest concentration of population in the country. This has enabled the province to retain its status as South Africa's holiday playground.

The domestic market is also the 'bread and butter' of a destination's tourism base. KZN has performed well in terms of the market share it attracts of the South African domestic market.

The purpose of this paper is to provide an overview of the state of and changes in domestic tourism to the province of KwaZulu-Natal over the past decade.

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2. Background

KwaZulu-Natal – a province of South Africa – has long performed well in and held the position of the country's oceanside playground. In the long ago pre and post-war years, people paraded gently along the Durban beachfront, dressed in what today's population would consider highly inappropriate dress for the seaside – three piece suits, bowler hats, long and frilly dresses with a multitude of petticoats. Later yet, the '50s and '60s saw the Durban beachfront as the preferred destination for multitudes of inland residents desperate for a taste of the sea and sand of the coast. By road it took a mere eight hours to drive, according to the legendary singer, Jeremy Taylor, in a 'Chevrolet' (Taylor, 1963). The verse goes:

Ag pleez deddy won't you take us off to Durban
It's only eight hours in the Chevrolet
There's spans of sea and sand and sun

And fish in the aquarium
That's a lekker place for a holiday

Today, tens of thousands of inland residents still make the journey to the coast of KZN, originating more frequently now from Soweto, Alexandra, Thembisa and Pretoria than perhaps from Johannesburg. And the new freeways mean the journey can be made in under six hours in the modern cars. Nevertheless, the GP cars – not just Chevrolets either - tend to predominate on the beachfront every summer holiday season, and KZN continues to reap the benefits of its fortunate position.

This paper considers who constitutes KZN's domestic tourists, where they come from and how many of them, what they do when they get her, how long they stay and how much they spend.

3. Overview of KZN's Domestic Tourists

KZN was the chosen destination of tourists who made some 8.3 million trips to and within the province during 2010. There was no difference in terms of the main source markets for domestic tourists to KZN and for holiday makers to the province. Tourists included people who travelled to the KZN for business, for education or medical reasons, or for a host of other options including visiting their friends and relatives, and to have a holiday. Holiday tourism constituted almost 36% of the total number of trips while visits to friends or relatives (VFR visits) made up a further 52% of the total. Business reasons added 8% to the overall figure while the rest, just over 4%, were made up of a variety of other options. These figures may have been a little different to the historical ratios as extra trips may well have been made into KZN to attend the 2010 World Cup football events in June and July of that year.

In the main, provincial tourists originated from, firstly, KZN itself, followed by Gauteng. This situation has historically been the case and seems unlikely to change in the near future. These two provincial source markets were followed by Limpopo and Mpumalanga, the Free State and the Eastern Cape.

On average, tourists to KZN spent almost 5 nights (4.6) in the province each trip. During their stay, they spent an average of approximately R710, resulting in a massive R5.6 billion being contributed to the provincial coffers as a direct result of the tourism sector's domestic performance.

4. KwaZulu-Natal's Domestic Tourism Activities and Attractions

While enjoying their stay in KZN, tourists engaged in a wide range of activities. In this manner, even VFR tourists contributed significantly to the tourism income of the province as they also went to restaurants, went shopping, enjoyed movies or concerts, visited museums, fairs or markets.

The table below provides an indication of the diversity of activities engaged in by tourists while they were in KZN during 2010:

Table 1: Activities Undertaken in KwaZulu-Natal by Domestic Visitors – 2010

Activity	%
Go to the beach	57.8
Visit a nature or wildlife or game reserve	25.8
Watch a live sports event	24.1
Visit a museum, art gallery or historical building	22.6
Visit an African township or cultural village on a tour	19.3
Take part in a sports event	18.5
Go to a live show, theatre or concert	17.3
Take part in any water sport	12.3
Visit an arts or craft outlet	11.7
Go hiking or mountain climbing	10.6
Food and wine fair	8.8
Bird watching	8
Mountain biking or other cycling	7.2
See bushman paintings	6.6
Art and crafts festival	6.3
Go backpack/hostel travelling	5.7
Attend a conference, workshop or training session	5.5
Visit a health spa	5.6
Fly-fishing	5.2
Horse riding	4.4
Tour of the battlefields	2.9

Source: TKZN, 2011

As can be seen from the table above, not only are the activities varied, but the parts of the province in which they are enjoyed are diverse also. Nevertheless, by far the most popular activity, and one engaged in by the majority of domestic visitors to KZN, is going to the beach. This has been the behavioural situation historically as well, as may be seen in the graph below:

Figure 1: KZN's Beach Users 2007-2011

Source: SAT, 2011; ACSA, TKZN, 2011

There are several noteworthy points on the graph above. The 2011 line indicates quite clearly that December 2011 saw the largest number of air passenger arrivals into Durban to date, as indicated by the circle on the graph. That month, together with July and October, appear as indicators that air passenger recovery was occurring, certainly as far as KZN was concerned. The

years 2008 and 2009 were poor years in terms of air arrivals. From the graph it is clear that 2009 was particularly poor.

From around September of 2010 then, and into 2011, all indications appeared to be that the recession was largely over, and travel numbers were increasing. The arrival figures for every month of 2011 up to and including December, are at the highest level since 2007. The year even started off with a substantive increase in arrivals in January, as is highlighted by the star in the graph above. The passenger arrival figures began to exceed those of the previous years from September 2010, and the higher levels have continued at these higher levels for the whole of 2011.

By January 2011, passenger arrivals totalled 223 982, a massive 34.2% increase over the same period in 2010. It should be kept in mind though that many of these may well be business visitors who might only be travelling to Durban for the day, and not spending any nights in the province. Obviously this sector would then not have an impact on hotel occupancies.

By the end of 2011, total air passenger arrivals showed an increase of 6% over the previous year. If both arrivals and departures are included, the KSIA reached and surpassed the magical figure of 5 million passengers through the airport.

It should be borne in mind that not all foreign tourists arrive in the province by air, although the majority appear to do so. In considering road arrivals, however, the vast majority of these are domestic tourists and thus this paper concentrates on air arrivals, both direct international flights and via domestic flights from other national airports such as Johannesburg and Cape Town.

The answer to the question 'how many?' has been given. What is needed now is the reply to the question, 'where from?' Even more important than total arrival numbers, once again, are thus the source markets from which such tourists originate. Further indicators of such changes in KwaZulu-Natal's foreign tourism situation in that regard are depicted in the table below:

Certain changes in the behaviour patterns of visitors to KZN should also be carefully noted. The effects of the economic crisis were felt by both foreign and domestic tourists. In KZN, with regard to the domestic market, this resulted in a decrease in the number of trips by domestic visitors, shorter stay lengths, but slightly increased spend. It appeared people were keen to travel and have their holidays, but reduced them in number and length so as to be able to afford them. However, when they did take their holidays, they spent more, indicating that they were determined to enjoy their hard-earned break. In all likelihood, indications are that an increased number of domestic tourists will be taking holiday in the coming year.

As the size of KZN's traditional markets decreases, due to the economic constraints of travelling long haul, the aging of the population which has family and friendship ties in the province, and the increasing take-up of many of the activities previously engaged in by tourists from those markets by the domestic market, the importance of the newer markets is likely to increase. An example of the domestic take-up is that where, in former years, some 90% of the visitors to tours of the Battlefields came from the UK and other parts of Europe, in the past two years, the majority of tourists undertaking Battlefields' tours have been from within the country (K Gillings, pers comm, 2011).

6. Conclusions and Recommendations

Indications at the end of 2011 are that the global economic crisis has ended and that recovery is has been occurring since late in 2010. The number of international travellers worldwide has increased, and the number of international visitors to South Africa had already shown an 17.6% increase according to the year to date information as at the end of December 2010. While South Africa might well lag behind the global recovery trends, there are, nevertheless indications that South Africa is also on a recovery path.

The recent economic crisis has also resulted in a number of changes with regards to the origin of tourists both to South Africa and to KwaZulu-Natal. The dramatic reduction in disposable income experienced throughout traditional markets in the northern hemisphere, in countries such as the UK, France and Germany, meant that many of those citizens who regularly and traditionally travelled to South Africa, and KwaZulu-Natal, simply did not come. Instead they were more likely to have travelled to countries closer to home, covering distances they could afford.

New markets being investigated by KZN to discover what products or experiences they require and what South Africa, KZN or even Durban could offer in that regard, are increasing in importance to the province. The demand trends are being studied very carefully in order to clarify what tourists, travellers, visitors or clients require, what they have been requesting, and how their requirements have changed through time. The tourist or visitor of today is not the same being as the one of 50, 20 or even 5 years ago. These efforts are being rewarded the increases in the numbers of tourists from KZN's new markets increase.

It is obvious that the numbers are still small, overall, when compared to the number of tourists from KZN's traditional markets, but the growth is clear and needs to be built upon. It is recommended that TKZN continues, and indeed increase its efforts in 'wooing' tourists from these new identified markets.

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