

INFORMATION GATHERING BY TOURISM KWAZULU-NATAL

Tourism KwaZulu-Natal Occasional Paper No. 91
February 2012

1. INTRODUCTION

The role of a provincial destination management organization (DMO) in South Africa is to market and promote the province, in this case, KwaZulu-Natal (KZN), both nationally and internationally. In order to undertake that responsibility effectively, there needs to be a very clear understanding of the tourism assets of the province as well as an understanding of how those assets perform. At another level, there also needs to be an understanding of how these assets fit together or are linked by means of a variety of infrastructural frameworks and networks. Most important of all is the need to understand the effects of these assets, their management and promotion, in terms of the tourists they attract.

In order to be effective in marketing the province, the DMO needs to have an understanding of the tourism sector at a variety of levels, international, national and regional. This is done by means of a number of tracking indicators including foreign and domestic tourists, spend and length of stay, thus linking the tourism assets to tourist activities. This paper attempts to explain how this is achieved in the case of Tourism KwaZulu-Natal (TKZN).

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2. BACKGROUND

Prior to 1996, destination marketing in South Africa was the ambit of the national body, South African Tourism, or SATOUR, which had a range of offices in the provinces of the country. This changed in 1996 when new legislation (the White Paper on Tourism in South Africa, and then the KwaZulu-Natal Tourism Act of 1996) devolved the responsibility for tourism promotion to the provinces. Each province, then, created its own marketing and promotional arm of the provincial tourism department, and thus in KwaZulu-Natal, the Department of Economic Development and Tourism (DEDT) has, as the provincial DMO, the KwaZulu-Natal Tourism Authority, trading as Tourism KwaZulu-Natal.

Each province thus became far more a master of its own tourism destiny, and this was able to be achieved through a more in-depth knowledge and understanding of tourism functioning in the provinces by those who worked in that sector on a daily basis.

3. THE CONTRIBUTION OF RESEARCH AND INFORMATION GATHERING TOWARDS DESTINATION COMPETITIVENESS

Hassan (2000: 239-240) defines competitiveness as the destination's ability to create and integrate value-added products that sustain its resources while maintaining market position relative to

competitors. According to d'Hartserre (2000) cited in Heath (2002: 335), competitiveness is the 'ability of a destination to maintain its market position and share and/or to improve upon them through time'.

Ritchie and Crouch (2000: 1) indicate that a destination's competitiveness involves a wide and complex range of issues. Crouch (2011) adds that such complexities are as a result of, amongst other things, the issue that the product of the tourism sector is an experience that is delivered by a destination. However, such an experience is not produced by a single firm, but by many players who all have a role in ensuring that the experience is a positive one. There are various models of destination competitiveness that have been developed by different researchers. Crouch (2011) cites contributions made by Crouch and Ritchie (1999), Dwyer and Kim (2003), Dwyer, *et al*, (2004) and Heath (2002).

According to Heath (2002) there are two different types of variables that are linked to the notion of destination competitiveness. The first of those are objectively measured variables such as visitor numbers, market share, tourist expenditure, employment and the value added by the tourism sector. The subjectively measured variables include the richness of culture and heritage, and the quality of the tourism experience. This paper concentrates on the first of these – the objectively measured variables.

Heath (2002:337) argues that models of destination competitiveness as proposed by various researchers such as Crouch, *et al*, (2000), Kim (2000) and others are not entirely relevant to the African perspective as they amongst others, 'do not appear to adequately provide an integrated treatment of various issues surrounding the concept of 'competitiveness'', and do not place adequate emphasis on key success drivers such as people and important linkages such as communication that need to be considered when developing a comprehensive framework of sustainable destination competitiveness. Ritchie and Crouch (2000) indicate the importance of 'sustainability' by indicating that 'competitiveness is illusory without sustainability'. Crouch and Ritchie (1999) cited in Ritchie and Crouch (2000: 5) suggest that for destinations to be competitive, their development for tourism must be sustainable not just economically and ecologically but also socially, culturally and politically. Hassan (2000: 240) adds that the link between market competitiveness and sustainable tourism is very logical and further indicates that when the tourism industry depends on the uniqueness of the environment, the resource must be protected to continue to draw tourists.

Figure 1 illustrates Crouch and Ritchie's model of destination competitiveness and sustainability. The model suggests the following:

- That the destination's competitiveness is based on the destination's comparative and competitive advantage
- That there are five groups under which different destination's competitiveness attributes fall. These are:
 - Supporting Factors and Resources
 - Core Resources and Attractors,
 - Destination Management,
 - Destination Policy, Planning and Development, and
 - Qualifying and Amplifying Determinants
- Furthermore, it recognises the role of the macro and micro environments in the overall tourism sector.

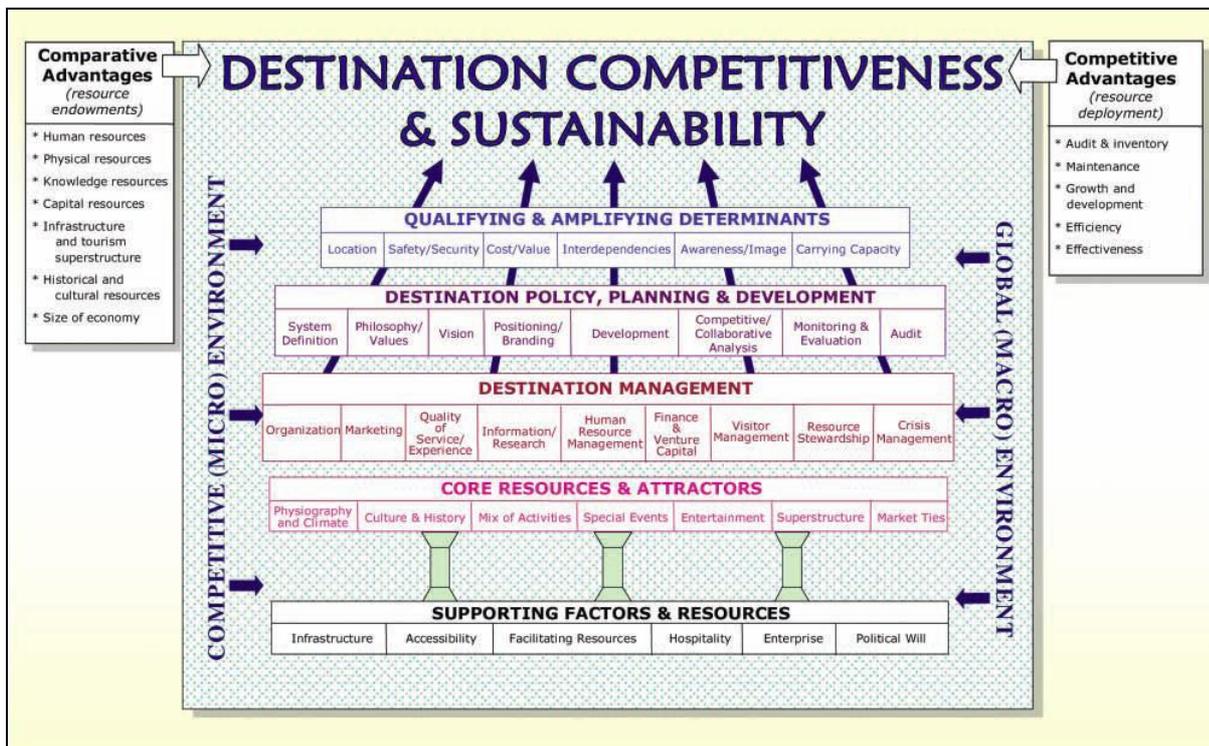


Figure 1: Crouch and Ritchie Conceptual Model of Destination Competitiveness (Crouch, 2011)

Using elements from different destination competitiveness models such as those of the researchers mentioned previously, Heath (2002) proposed an integrated model geared towards enhancing Africa's sustainable tourism competitiveness which is reflected as Figure 2. Heath's model also indicates elements which are essential for a destination's competitiveness. This model takes the form of a house and suggests the following:

- That there are foundation elements that provide a base for competitiveness
- The cement elements bind and link respective facets of competitiveness
- The building blocks which are essential to make tourism happen in a destination
- The key success drivers (the roof) which comprises the people part of destination competitiveness

There are similarities between these two models. One of the elements that features in both of these models (Figure 1 and Figure 2) is the aspect of information/research which is seen as important for destination competitiveness.

Heath (2002) reinforced the importance of information management and research by indicating that destinations that gather and use information effectively can improve their competitive positions. He acknowledges the importance of information management, research and forecasting as part of the 'cement' which binds and links different facets of competitiveness. Similarly, the Crouch and Ritchie conceptual model in Figure 1 also identified 'information/research' as one of 36 attributes of destination competitiveness. According to Hassan (2000), market information needs to be collected and analysed to alert destination(s) of any signs of decline such as:

- Arrivals from traditional markets
- Length of stay
- Lower per tourist spending rates

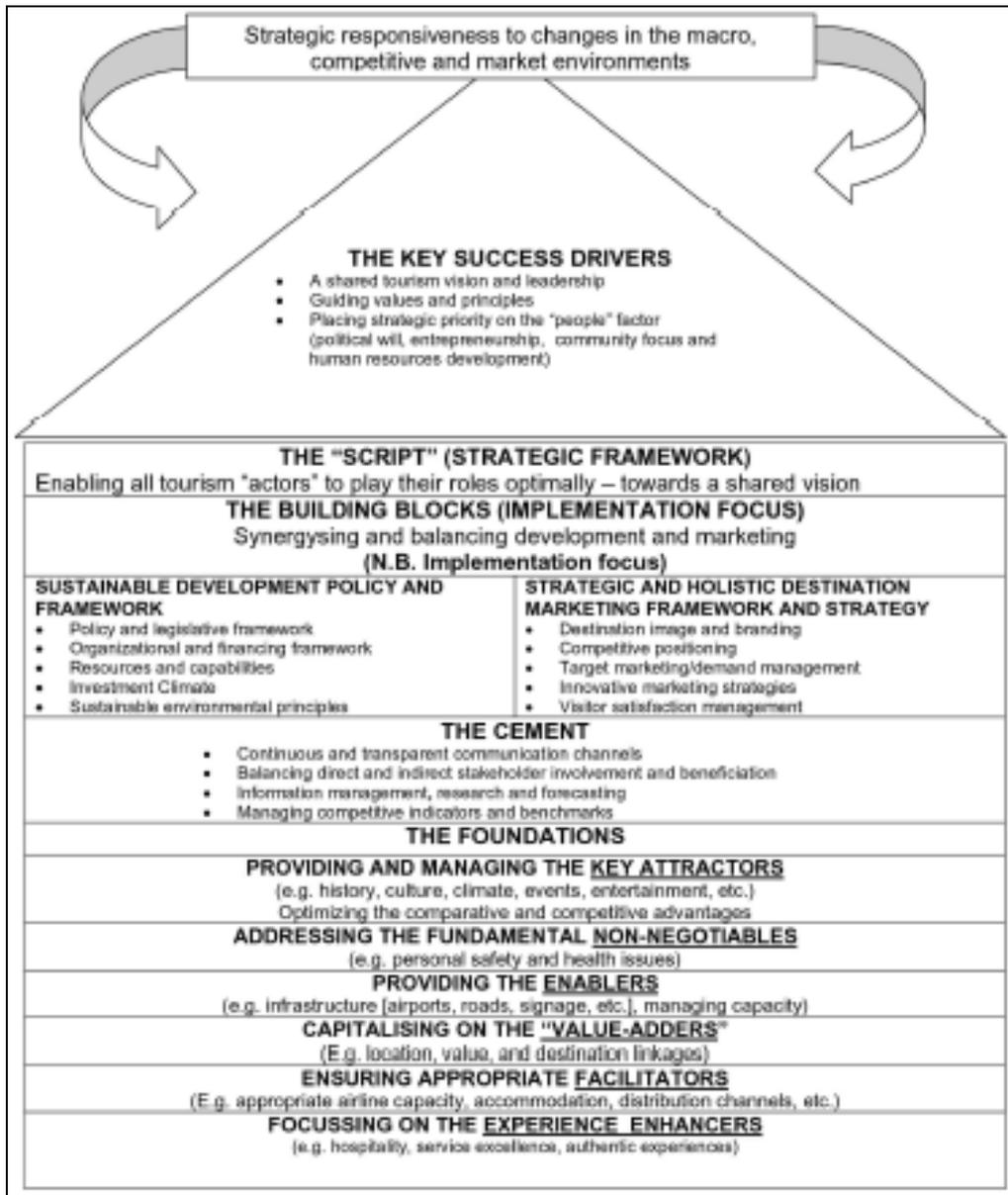


Figure 2: Towards a model for enhancing Africa's sustainable tourism competitiveness (Heath, 2002)

It is against this background that this paper focuses on gathering and measuring information, particularly that pertaining to tourist behaviour, for the province of KZN, as this aspect plays an important role in destination competitiveness.

4. INFORMATION GATHERING

In order for TKZN to be as effective as possible as a DMO, it is crucial to obtain an understanding of the tourism sector on a range of levels, from the most globally significant, to the most locally effective. The organization uses different ways of collecting information in order to report on the

status of tourism in the province of KZN. On an annual basis, the organization publishes a brochure which is termed 'Statistics of our Tourism Sector' as part of this information and reporting responsibility.

According to Kelly, Williams, Schieven & Dunn (2006) a number of organizations/companies such as tourism operators, government and destination marketing organizations use tourist numbers to make planning and developmental decisions. Similarly, TKZN needs this information, not only for development and planning purposes, but to also report to its funders as to the performance of the tourism sector within the province of KZN. As Leiper (1989), in Kelly, *et al*, (2006:449) indicates, reliable tourist attendance information is a core metric for evaluating the performance and competitiveness of tourism destinations.

Therefore, this part of the paper describes how the organization obtains information to be able ultimately to produce the statistics brochure referred to herein. Such information is then used in various ways, such as for marketing and development purposes.

4.1 International level

At a global or international level, statistics are collected and collated by a range of organizations. These include the United Nations World Tourism Organization (UNWTO), the World Travel and Tourism Council (WTTC) and the Travel and Tourism Research Association (TTRA). All the members of TKZN's research division, which is located within that organization's Tourism Information Services Department, are members of the TTRA and associate members of the UNWTO. This membership allows them access to a range of international information. Statistics are collected on an annual basis from these sources, and the relevant information is then provided by TKZN as reflected in Table 1 and Table 2 below.

Table 1: Global Foreign Tourism Market 2010

	World	Africa	South Africa	KZN
Size	940mn ¹	48.8mn ¹	8.1mn ⁴	±956 550 ⁴ (±393 017*)
Growth (%)	6.7% ¹	6.4% ¹	15.1%	11% ⁴
Direct Spend (Tourism Receipts)	U\$919bn ¹	U\$128 bn ¹	R72.6bn ⁴ (excluding CAPEX) R76.3bn (including CAPEX)	R8.75billion ⁴
Daily Spend	-	-	R1 080 ⁴	R1 080 ⁴
Average Stay (nights)	-	-	8.5 nights ⁴ (most common 6 nights)	Avg 6.8 nights ⁷ (6.297mn bednights in total) ⁴

Source: WTO 2011¹, WTTC², SAT⁴, methodology changed in 2009, only overnight tourists included; TKZN⁵, *African air and overseas departures 2010. KZN 9.4% of RSA's total of 66.9mn bednights in 2010.

Table 2: Global Tourism Contribution 2010

	World	Africa	South Africa	KZN
Number Directly Employed	96 mn*	7.7mn*	±389 100*	±151 000***
Total Employed	258.6 mn*	18mn*	±590 200**	±153 000***
Contribution to GDP %	9%*	±10.2%*	±11.5%*	±8%
Total Direct Contribution to GDP (Foreign + Domestic)	US\$1 758bn*	U\$73bn*	±R93.6 bn**	±R22bn***
Total Contribution to GDP (Foreign + Domestic)	U\$5 702bn*	U\$162bn*	±R194.5 bn*	±R32bn***

Source: WTTC 2011*, SAT**, TKZN*** 2011, **** Stats SA derived from GDPR for KZN Current Prices - domestic and international† Stats SA derived from GDPR for KZN Constant Prices

4.2 National level

Statistics are collected, collated, analysed and disseminated by a range of national bodies as well. In the case of South Africa, these are organizations such as South African Tourism (SAT) and Statistics South Africa (STATSSA). SAT is able to provide data, mainly at a national level, informing the DMO of the national scale tourism picture including the number of foreign tourists to the country, the length of stay, the spend, the number of people employed in the sector and the contribution of tourism to the national GDP. As such information has been obtained through a substantial amount of time, trends can be identified and informed decisions made regarding strategy. TKZN reports on these data as reflected in Table 3:

Table 3: The South African Foreign Picture 2010

Numbers of foreign tourists	8.074mn
Spend - pppd	R1 094 (R9 300 per trip)
Average length of stay	8.5 nights
Main overseas source markets	UK, USA, Germany, Netherlands, France

Source: SAT 2011

SAT obtains primary data by conducting monthly surveys (Departure Surveys) of departing foreign tourists at OR Tambo and Cape Town International Airports (SAT, 2011). **Appendix 1** is what is called 'Table A' that SAT publishes on a monthly basis which shows the number of foreign tourists to South Africa in a particular month as well as the countries they came from. SAT also collects primary data through monthly surveys conducted in 10 land border posts. From this information, TKZN is then able to work out the proportion of tourists to the province in a particular year.

4.3 Provincial/Regional Level

At a regional level, statistics are gathered also, but often in a very different way to how it is done at higher levels. In some instances, there are similarities with how this is done and the type or form of data collected at a national scale, such as the obtaining of monthly air passenger arrival statistics from the provincial airport. In other instances, both the method of collection and the type of data are somewhat different to those at the larger scales, but serve to add to the understanding of the nature and functioning of the tourism sector in the province. From the SAT information, TKZN is

able to distinguish between domestic and foreign tourists. This information assists the organization in market segmentation which results in developing relevant marketing campaigns aimed at specific segments.

Due to the small amount of province-specific data available from SAT, TKZN also adds a number of key questions into a national, syndicated study (the Omnibus Study) on an annual basis, thereby obtaining statistics on tourism behavior within the province as well on the functioning of the provincial tourism brand. The following information pertains to the 2011 study and relates to how the omnibus study was undertaken:

a) Methodology

Personal at-home interviews were conducted in the respondent's home language or their preferred language. The interviews are conducted using a structured questionnaire on a Computer Assisted Personal Interview machine. The questions for TKZN which are part of the syndicated study are attached as **Appendix 2**.

b) Sample and Sampling

An area-stratified probability sample of 2,479 households divided into 1240 males and 1239 females was drawn from the research company's customized research computerised dwelling unit census. In terms of coverage, the study covered Black, Coloured, Indian and White adults aged 16 and over.

c) Fieldwork

This was undertaken countrywide during the month of February and conducted by trained, experienced interviewers who work under the direction of regional supervisors and field managers.

4.3.1 Occupancy levels - data

TKZN subscribes to an international company which provides monthly occupancy levels of hotels for the province of KZN. Participating properties are drawn from a population of 124 properties with a total of 10,988 rooms. This figure will change as the number of participating properties increases. Data are obtained not only for KZN as a whole, but also for sub-sections such as Durban Central and Greater Durban for comparative purposes. Occupancy data are also obtained for other provinces such as Gauteng and the Western Cape, as well as for South Africa as a whole.

4.3.2 Land arrivals – toll plaza information

TKZN also receives information on the number and class of vehicles that passed through a particular toll plaza at a particular period. For example, the organization receives toll plaza information from the Mooi River Toll Plaza which provides an indication on the level of vehicles that passed through the plaza during the holiday period. From this information, the organization is able to determine whether or not there was a substantial increase of vehicles into the province. Such information is then used with other sources of information to create the overall picture of tourism at a particular point in time.

4.3.3 Event impact assessments

At the lowest or most local level, TKZN conducts economic impact assessment surveys of major tourism-related events. This is done in order to ascertain the numbers of people attracted into an area by an event as well as the economic impact of that event on the area. The brand noting and associations are also tested at the same time.

5. CHALLENGES

Within the tourism context, there are multiple industries involved in creating and sustaining destinations (Hassan, 2000). As such, the DMO requires the support of different role-players as the tourism sector cuts across many sectors. This poses a challenge in instances where the organization has to rely on different organizations to provide information to be able to create meaningful picture/status of the tourism sector in the province in a timely manner.

There is lack of information from other role-players who would provide occupancy data. For example, the accommodation sector is not yet able or perhaps unwilling to provide the level of information needed to create meaningful picture of tourism in the province. The organization has to rely on an international company for monthly occupancy data. A new initiative called Hospitality Stats-on-line which is facilitated by the Federated Hospitality Association of Southern Africa has begun collecting local accommodation sector occupancy data. To date it has very few participating properties in KZN. The figure is still too low to provide accurate reflections of what may be happening. However, it will prove useful in future should the number of properties increase.

Furthermore, data are either not collected by other provinces or the methodology differs. TKZN is participating in a national initiative aimed at getting all provinces to collect the same data in the same manner and report on it in the same format. This will be helpful in aggregating the data for the participating provinces so as to obtain an overall picture of the tourism sector in SA. It will also enable valid comparisons between tourism performance of the provinces.

6. CONCLUSIONS AND RECOMMENDATIONS

This paper was based on research and information gathering as one of the important aspects of destination competitiveness. It focused on the functioning of TKZN in terms of how it gathers data at international, national, provincial and regional levels to assist with marketing and for developmental purposes.

It is recommended that TKZN continues to refine these data collection methods. It must continue to search for and consider other appropriate sources of data and methodologies in order to ensure that the organization is on par with other international organizations of similar nature.

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APPENDIX 1

TABLE A - MAY 2011

TOTAL TOURISTS*

*Foreign tourist, any visitor travelling to a place other than that of his/her usual environment for more than 1 night but less than 12 months, and whose main purpose of the trip is other than the exercise of an activity remunerated from within the place visited.

JAN TO MAY 2011 COMPARED WITH JAN TO MAY 2010

COUNTRY OF RESIDENCE	MAY	MAY	DIFFERENCE	%	JAN TO MAY		DIFFERENCE	%
	2011	2010			2011	2010		
EUROPE:								
Austria	959	1,085	-126	-11.6%	8,994	7,955	1,039	13.1%
Belgium	1,921	2,131	-210	-9.9%	15,285	14,583	702	4.8%
Denmark	1,122	1,246	-124	-10.0%	10,433	10,700	-267	-2.5%
Finland	512	489	23	4.7%	4,485	4,061	424	10.4%
France	6,456	6,887	-431	-6.3%	43,128	43,778	-650	-1.5%
Germany	10,552	6,315	4,237	67.1%	96,692	82,292	14,400	17.5%
Greece	443	535	-92	-17.2%	2,362	2,698	-336	-12.5%
Hungary	177	181	-4	-2.2%	1,214	1,182	32	2.7%
Ireland	1,590	1,880	-290	-15.4%	12,100	12,675	-575	-4.5%
Italy	2,969	3,543	-574	-16.2%	17,218	16,557	661	4.0%
Netherlands	5,055	6,508	-1,453	-22.3%	41,075	43,905	-2,830	-6.4%
Norway	1,015	791	224	28.3%	9,237	8,341	896	10.7%
Poland	542	485	57	11.8%	4,097	3,732	365	9.8%
Portugal	2,789	3,090	-301	-9.7%	16,734	12,935	3,799	29.4%
Russian Fed	677	748	-71	-9.5%	4,123	4,142	-19	-0.5%
Spain	1,748	1,964	-216	-11.0%	8,440	8,055	385	4.8%
Sweden	1,547	1,585	-38	-2.4%	18,242	17,729	513	2.9%
Switzerland	1,788	1,962	-174	-8.9%	15,761	13,518	2,243	16.6%
UK	22,484	28,011	-5,527	-19.7%	184,899	190,794	-5,895	-3.1%
Other	1,422	1,700	-278	-16.4%	9,728	10,052	-324	-3.2%
EUROPE	65,768	71,136	-5,368	-7.5%	524,247	509,684	14,563	2.9%
NORTH AMERICA:								
Canada	3,920	4,007	-87	-2.2%	23,587	20,133	3,454	17.2%
USA	24,034	23,101	933	4.0%	104,156	92,382	11,774	12.7%
Other	-	-	0	#DIV/0!	-	12	-12	-100.0%
NORTH AMERICA	27,954	27,108	846	3.1%	127,743	112,527	15,216	13.5%
CENTRAL & SOUTH AMERICA:								
Argentina	661	1,259	-598	-47.5%	6,587	6,307	280	4.4%
Brazil	3,214	3,298	-84	-2.5%	17,852	13,874	3,978	28.7%
Chile	211	323	-112	-34.7%	1,325	1,276	49	3.8%
Mexico	201	453	-252	-55.6%	1,067	1,356	-289	-21.3%
Venezuela	80	85	-5	-5.9%	427	499	-72	-14.4%
Other	807	1,088	-281	-25.8%	3,854	4,103	-249	-6.1%
CENTRAL & SOUTH AMERICA	5,174	6,506	-1,332	-20.5%	31,112	27,415	3,697	13.5%
AUSTRALASIA:								
Australia	7,325	7,300	25	0.3%	38,519	34,336	4,183	12.2%
New Zealand	1,191	1,363	-172	-12.6%	6,706	6,503	203	3.1%
Other	14	10	4	40.0%	87	194	-107	-55.2%
AUSTRALASIA	8,530	8,673	-143	-1.6%	45,312	41,033	4,279	10.4%
ASIA:								
China (including Hong Kong)	5,677	4,971	706	14.2%	29,453	23,899	5,554	23.2%
India	10,333	8,317	2,016	24.2%	34,698	24,450	10,248	41.9%
Indonesia	381	224	157	70.1%	1,130	934	196	21.0%
Japan	2,190	1,935	255	13.2%	8,550	7,611	939	12.3%
Rep of Korea	1,186	1,333	-147	-11.0%	6,558	6,614	-56	-0.8%
Malaysia	1,237	519	718	138.3%	3,989	2,316	1,673	72.2%
Philippines	658	410	248	60.5%	3,010	1,695	1,315	77.6%
Singapore	531	407	124	30.5%	2,394	1,808	586	32.4%
Rep of China (Taiwan)	562	617	-55	-8.9%	3,505	3,862	-357	-9.2%
Thailand	534	592	-58	-9.8%	2,847	2,054	793	38.6%
Other	2,189	2,547	-358	-14.1%	10,669	9,510	1,159	12.2%
ASIA	25,478	21,872	3,606	16.5%	106,803	84,753	22,050	26.0%
MIDDLE EAST:								
Israel	1,235	1,211	24	2.0%	7,130	6,919	211	3.0%
Saudi Arabia	193	152	41	27.0%	1,133	1,061	72	6.8%
Turkey	668	678	-10	-1.5%	4,503	3,610	893	24.7%
United Arab Emirates	75	74	1	1.4%	351	564	-213	-37.8%
Other	847	851	-4	-0.5%	5,967	5,464	503	9.2%
MIDDLE EAST	3,018	2,966	52	1.8%	19,084	17,618	1,466	8.3%
AFRICA MAINLAND:								
Angola	2,751	2,760	-9	-0.3%	15,146	15,785	-639	-4.0%
Dem Rep of Congo	2,726	2,533	193	7.6%	13,938	11,785	2,153	18.3%
Botswana	36,094	41,310	-5,216	-12.6%	197,163	209,545	-12,382	-5.9%
Egypt	449	504	-55	-10.9%	2,762	2,194	568	25.9%
Ghana	1,412	1,273	139	10.9%	6,599	5,418	1,181	21.8%
Kenya	2,391	2,355	36	1.5%	11,731	10,527	1,204	11.4%
Lesotho	130,224	87,504	42,720	48.8%	643,969	487,015	156,954	32.2%
Malawi	10,004	10,643	-639	-6.0%	49,026	45,789	3,237	7.1%
Mozambique	88,202	81,958	6,244	7.6%	477,737	438,977	38,760	8.8%
Namibia	15,802	17,683	-1,881	-10.6%	78,285	78,809	-524	-0.7%
Nigeria	5,480	3,971	1,509	38.0%	23,446	18,056	5,390	29.9%
Swaziland	56,227	55,919	308	0.6%	273,953	263,945	10,008	3.8%
Tanzania	2,544	1,624	920	56.7%	10,801	6,795	4,006	59.0%
Uganda	1,183	1,100	83	7.5%	5,821	5,172	649	12.5%
Zambia	13,272	14,253	-981	-6.9%	63,339	64,673	-1,334	-2.1%
Zimbabwe	134,168	75,992	58,176	76.6%	629,547	598,091	31,456	5.3%
Other	4,404	4,461	-57	-1.3%	21,909	24,065	-2,156	-9.0%
TOTAL AFRICA MAINLAND	507,333	405,843	101,490	25.0%	2,525,172	2,286,641	238,531	10.4%
INDIAN OCEAN ISLANDS:								
Mauritius	1,211	1,186	25	2.1%	6,423	5,830	593	10.2%
Reunion	-	13	-13	-100.0%	2	194	-192	-99.0%
Seychelles	232	226	6	2.7%	1,365	1,126	239	21.2%
TOTAL INDIAN OCEAN ISLANDS	1,443	1,425	18	1.3%	7,790	7,150	640	9.0%
TOTAL AFRICA	508,776	407,268	101,508	24.9%	2,532,962	2,293,791	239,171	10.4%
Unspecified	2,087	61,014	-58,927	-96.6%	9,697	78,437	-68,740	-87.6%
GRAND TOTAL	646,785	606,543	40,242	6.6%	3,396,960	3,165,258	231,702	7.3%
** OVERSEAS TOTAL	135,922	138,261	-2,339	-1.7%	854,301	793,030	61,271	7.7%

** GRAND TOTAL LESS TOTAL AFRICA AND UNSPECIFIED W.E.F. JANUARY 2001
 SA TOURISM CLASSIFIES TURKEY IN THE MIDDLE EAST AND NOT IN EUROPE
 SOURCE: STATISTICS SA

APPENDIX 2

Questions – for Tourism KwaZulu-Natal: 2012

1. Which South African holiday destinations do you immediately think of?
INTERVIEWER: PLEASE CODE INTO THE REGIONS (eg. If respondent says Amanzimtoti, capture as South Coast). MAKE SURE THAT YOU TYPE IN SUFFICIENT DETAILS FOR “OTHER” RESPONSES TO ENABLE PROPER IDENTIFICATION OF THE AREA.

KwaZulu-Natal	Durban
	North Coast
	South Coast
	uKhahlamba Drakensberg
	Battlefields
	PMB/Midlands
	Elephant Coast
	Zululand
Gauteng	West Rand
	Johannesburg
	Tshwane (Pretoria)
	Ekurhuleni (East Rand)
	Metsweding
	Sedibeng
Eastern Cape	Amatole
	Chris Hani
	Cacadu
	Ukhahlamba
	Oliver Tambo
Western Cape	Cape Town
	West Coast
	Overberg
	Winelands
	Inland
	Garden Route
Mpumalanga	Panorama
	Lowveld Legogote
	Cosmos Country
	Cultural Heartland
	Wild Frontier
	Highlands Meander
	Grass & Wetlands
North West	Bojonala
	Bophirima
	Central
	Southern
Limpopo	Waterberg
	Zoutpansberg
	Capricorn
	Valley of the Olifants
Northern Cape	Diamond Fields
	Green Kalahari
	Kalahari
	Karoo
	Namakwa
Free State	Xhariep
	Lejweleputswa
	Motheo
	Thabo Mofutsanyana
	Northern Free State

2. **SHOWCARD K2.** How familiar are you with the following holiday destinations:

Choice	Not very familiar 1	Somewhat familiar 2	Very familiar 3
KwaZulu-Natal			
Durban			
Pmb / Midlands			
South Coast			
North Coast			
Zululand			
Drakensberg			
Elephant Coast			
Battlefields			

3. Are you specifically looking for information on any of the following?
INTERVIEWER: IF KWAZULU NATAL NOT SELECTED AND ANY OTHER AREA IS, PLEASE SELECT KWAZULU NATAL BEFORE CONTINUING.

	Yes	No
KwaZulu-Natal		
Durban (greater Durban area including Umhlanga, Westville, Amanzimtoti, Valley of 1000 Hills)		
Pietermaritzburg & Midlands		
Battlefields (eg Ladysmith, Dundee, Newcastle, Vryheid)		
Drakensberg and East Griqualand		
South Coast (eg Scottburgh, Port Shepstone, Margate, Port Edward)		
North Coast (eg Ballito, Shaka's Rock, Stanger)		
Zululand (eg Richard's Bay, Empangeni, Eshowe, Melmoth, Ulundi)		
Elephant Coast		

4. Are you considering visiting any of these destinations?
INTERVIEWER: IF KWAZULU NATAL NOT SELECTED AND ANY OTHER AREA IS, PLEASE SELECT KWAZULU NATAL BEFORE CONTINUING.

Choice	Yes	No
KwaZulu-Natal		
Durban		
Pmb / Midlands		
South Coast		
North Coast		
Zululand		
Drakensberg		
Elephant Coast		
Battlefields		

ASK FOR EACH CODE SELECTED IN Q4

5. What prompted you to consider visiting this/these leisure destination(s) on this trip? **(SELECT ALL THAT APPLY)**

Choice	
Recommended by a friend/colleague/family member	
Have previously visited this country for Business	
Was visiting a friend/family member who stays in that country	
Went for a specific event (e.g. wedding, concert, sports events etc.)	
Went for a specific recreational purpose (e.g. scuba diving, trekking, wildlife safari, golfing, sailing etc.)	
Read a magazine article describing the region	
Read an article on a website describing the region	
Read about the location in a travel book	
Saw an advertisement in a magazine	
Saw an advertisement on a website	
Saw a television commercial	
Saw a show on television showcasing the region	
Saw locations of the country in a movie	
Airline advertised the location	
Location was just a part of a travel package that was taking me to another country that I wanted to visit	
Location was just part of a cruise package	
Read in a travel journal/magazine about the region	
Heard about the location from travel agent	
Other (please specify)	

6. **(SHOW LOGO)** Have you seen this advertisement logo before?

- Yes
- No



7. **IF YES IN Q6 ASK Q7.** Where have you seen this logo?

- a. TV
- b. Magazine
- c. Newspaper
- d. Internet/website
- e. Travel guide
- f. Bill board
- g. Toll Gate
- h. Other

8. **ASK ALL:** What do you associate with the Zulu Kingdom brand? **(PROBE FULLY)**

- i. CODING TO USE CODEFRAME DEVELOPED FROM 2004

9. Did you visit the province of KwaZulu-Natal in 2009? **(IF NO, SKIP 10-12B).**

- Yes
- No

10. How many trips did you make to the following places during the whole of 2009, for what main purpose, and how many nights did you spend in total?

	Nights				Main Purpose	
KwaZulu-Natal	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	Visiting friends/relatives <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>
Durban (greater Durban area including Umhlanga, Westville Amanzimtoti, Valley of 1000 Hills)	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	Visiting friends/relatives <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>
Pietermaritzburg & Midlands	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	VFR <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>
Battlefields (eg Ladysmith, Dundee, Newcastle, Vryheid)	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	VFR <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>
Drakensberg and East Griqualand	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	VFR <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>
South Coast (eg Scottburgh, Port Shepstone, Margate, Port Edward)	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	VFR <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>
North Coast (eg Ballito, Shaka's Rock, Stanger)	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	VFR <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>
Zululand (eg Richard's Bay, Empangeni, Eshowe, Melmoth, Ulundi)	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	VFR <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>
Elephant Coast	1	<input type="checkbox"/>	5	<input type="checkbox"/>	15+ <input type="checkbox"/>	Holiday <input type="checkbox"/>
	2	<input type="checkbox"/>	6	<input type="checkbox"/>	0 (skip to next) <input type="checkbox"/>	VFR <input type="checkbox"/>
	3	<input type="checkbox"/>	7	<input type="checkbox"/>		Business <input type="checkbox"/>
	4	<input type="checkbox"/>	8-14	<input type="checkbox"/>		Other <input type="checkbox"/>

FOR Q10 NO. OF TRIPS TO KZN MUST NOT EQUAL ZERO

FOR Q10, ALL DESTINATIONS MUST BE ROTATED EXCEPT FOR KWAZULU NATAL WHICH MUST BE ASKED FIRST

ALLOW FOR ZEROS AT "NUMBER OF NIGHTS SPENT" IN Q10 FOR ALL DESTINATIONS INCLUDING KZN

NO OF NIGHTS SPENT AT ALL DESTINATIONS IN Q10 MUST BE EQUAL TO NO. OF NIGHTS SPENT IN KZN

11. Would you recommend KwaZulu-Natal as a tourism destination to family and friends, and why?

Yes

No

Reason:-

- Friendly people
- Excellent beaches
- Weather
- Shopping facilities
- Game reserves

- Adventure activities
- Scenery
- Drakensberg
- Service
- Zulu history/heritage
- Museums
- Art galleries
- Entertainment
- uShaka Marine World
- Casinos
- Value for money
- Routes eg Midlands Meander
- Diverse attractions/lots to do
- Other (specify)

12a. While you were in KwaZulu-Natal did you participate in any of the following activities? **READ OUT**

SHOWCARD K12b

12b. (*Exclude activities mentioned in q12a*) Which of these activities would you be interested in participating in?

INTERVIEWER: PLEASE READ OUT EACH ACTIVITY ON SCREEN.

	Interested	Not interested	Did
Take part in a sports event			
Watch a live sports event			
Take part in any water sport			
Go hiking or mountain climbing			
Go backpack/hostel travelling			
Fly-fishing			
Visit a museum, art gallery or historical building			
Go to a live show, theatre or concert			
Attend a conference, workshop or training session			
Visit a nature or wildlife or game reserve			
Visit an arts or craft outlet			
Visit an African township or cultural village on a tour			
Mountain biking or other cycling			
Bird watching			
Art and crafts festival			
Food and wine fair			
Tour of the battlefields			
Horse riding			
Visit a health spa			
See bushman paintings			
Go to the beach			
Take part in any other special activity (please specify):			