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Development of a framework to assess the economic impact of Coastal and Marine Tourism (CMT) in South Africa – Phase 3

Data Analysis: Key Findings

Prof Urmilla Bob – Project Leader



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Presentation outline

- Main survey research questions
- Sampling approach
- Key descriptive results from surveys
- Economic modelling preliminary findings
- Outstanding activities and timelines

Survey research questions

- What are the socio-economic profiles of CMT demand-side (tourists/ customers/ users) and supply-side (accommodation, tour operators, retail and restaurant businesses/ establishments, and CMT business owners) stakeholders?
- What are the income and expenditure patterns of the demand and supply-side stakeholders?
- What types of CMT products are being consumed and/or what types of CMT activities are users participating in?
- What types of accommodation are being used and what is the length of stay?
- How do users/ consumers/ tourists perceive the CMT destination/ location?
- In relation to the demand-side stakeholders:
 - How many service providers do they use, what is their profile and how much do they pay for these services?
 - What is the profile (age, gender, racial background and location) of the persons employed in relation to temporary and permanent jobs created?
 - What are the high and low seasons in relation to CMT activities?
 - What are the average number of clients or occupancy rates of establishments?

Proposed sampling framework

Surveys by province	KZN		WC		EC		NC		Total	
	T	C	T	C	T	C	T	C	T	C
Customer/ tourist/ user	1 200	1220	1 100	1110	600	701	100	-	3 000	3031
Accommodation	50	58	50	45	20	22	5	-	125	125
CMT business owners	50	41	50	39	15	14	5	-	120	94
Retail outlets and establishments (+ 5 customer surveys per site)	50	54	50	50	20	21	5	-	125	125
Tour operators	25	30	25	23	15	13	5	-	70	66

With the exception of customers/ tourists/ users, for the rest of the stakeholders provincial/ national databases with contact details were required to facilitate data collection and approach.

Key research findings: CMT users/ tourists

- Average age of respondents: 36 years (mainly younger and middle-aged groups)
- Higher education levels among tourists and day trippers than locals
- Average monthly income R25 282.49 (mainly more than R10 000)
- Almost equal proportions of male and female respondents
- Racial diversity in terms of CMT location visitation
- Among the day visitors and tourists:
 - 25.6% were foreign
 - 46.7% were South Africans

	Frequency (n=3031)	Percentage
Overnight	1566	51.7
Day visitor	649	21.4
Local resident	805	26.6

Types of coastal and marine tourism activities have or will respondent be participating in during this visit to this beach location

	THIS VISIT		
	Did	Will do	Future interest
Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)	7.3	5.9	27.0
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)	6.5	7.3	26.6
Scuba diving/snorkelling (e.g. shark cage diving)	3.1	3.1	23.2
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding (SUP), yachting, water skiing, water surfing)	15.3	11.7	34.3
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)	4.9	5.4	30.4
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)	6.0	4.8	27.6
Sand/beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)	77.6	32.4	45.0
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)	13.8	13.9	31.4
Sightseeing (e.g. light house tourism, cycling, marathons)	24.6	17.8	36.8
Educational and scientific excursions (e.g. aquariums)	6.3	6.6	31.2
Spiritual experiences	3.7	4.6	27.7
Pure recreational (e.g., dining out, shopping)	38.0	16.5	30.7

Key research findings: CMT users/ tourists

- Main non-CMT activities participated in:
 - Adventure
 - Food and wine
 - Shopping
- Average number of times participated in CMT activities previously: 12
- Almost all would participate in CMT activities again and advise friends, relatives and/or colleagues to participate in CMT activities in South Africa
- Average group size: 2.9
- Main reason for visiting CMT location
 - Participation in coastal and marine tourism activity in the beach/coastal location
 - Holidays
- Average number of nights outside location but in South Africa among overnight visitors: 4.4
- Average number of nights in location among overnight visitors: 8.8
- Main modes of transportation used: private and rental vehicles, walked

Spend patterns: CMT users/ tourists

	P/A	F&D	Mer	S	TL	TV	AL	AO	O	TOTAL
No response/ cannot recall	8.0	16.6	6.8	15.7	11.8	9.2	7.4	6.4	6.4	.2
None	72.4	8.3	81.2	57.2	54.4	47.3	66.9	73.3	77.4	2.7
< 250	4.3	16.2	3.6	4.9	18.2	2.9	.7	.2	3.0	7.3
250-500	4.5	20.1	3.6	5.8	7.0	4.1	1.0	.4	3.8	11.7
501-750	1.9	8.2	1.0	1.1	1.5	2.2	1.0	.1	.8	5.4
751-1000	1.9	8.3	1.2	4.2	3.1	4.7	1.3	.4	2.0	6.4
1001-1500	1.7	5.5	.6	1.3	1.2	2.8	1.9	.9	1.1	5.9
1501-2000	1.5	3.9	.9	2.9	1.1	2.7	1.6	1.3	1.8	4.6
2001-2500	.5	2.2	.2	.9	.3	1.6	1.5	.4	.5	2.8
2501-3000	1.2	3.2	.1	1.3	.4	2.0	1.9	1.0	1.0	3.3
3001-4000	.7	2.1	.1	.3	.3	2.0	1.9	1.2	.3	3.9
4001-5000	.9	2.4	.1	1.3	.2	1.4	1.4	1.2	.6	3.5
> 5000	.5	4.8	.7	2.1	.6	17.1	11.5	13.3	1.2	42.4
Average (Rands)	305	1529	150	880	387	9451	2462	5489	481	24758

Agreement with statements: CMT users/ tourists

STATEMENT	NR	1	2	3	4	5	Average
Well maintained location	.1	2.5	5.5	10.2	40.9	40.7	4.1
Parking is adequate	.1	7.3	11.6	19.5	34.8	26.7	3.6
Sufficient facilities and amenities (e.g. toilets)	.2	8.3	14.2	19.8	27.6	29.8	3.6
Good refreshment areas/food variety	.3	6.2	10.4	12.9	38.1	32.1	3.8
This is a green location that encourages responsible environmental practices (e.g. recycling)	.3	2.5	9.5	26.4	30.1	31.1	3.8
Signage to location was clear	.1	3.2	7.8	15.3	42.4	31.2	3.9
Safe location	.1	3.9	8.6	15.1	38.9	33.3	3.9
Entertainment opportunities available in the location	.2	6.7	12.5	18.1	34.4	28.1	3.7
Location is too crowded	.1	16.5	19.4	14.1	21.1	28.8	3.3

Key research findings: Demand-side stakeholder

Number of years in operation

	Accommodation (n=125)	Restaurants and retail (n=125)	CMT Businesses (n=96)	Tour Operators (n=66)
No response/ Don't know	.8	-	1.1	-
< 5	11.2	12.0	17.0	6.1
5-9	36.0	27.2	31.9	24.2
10-14	27.2	29.6	28.7	28.8
15-20	13.6	19.2	12.8	25.8
> 20	11.2	12.0	8.5	15.2
Average	11.4	12.3	10.2	13.4

Occupancy rates

- Average number of rooms in accommodation establishment: 29.3
- Average number of persons who can be accommodated per room: 2.9
- Average room occupancy
 - Low season: 61.7%
 - High season: 90.9%
- Average room rates
 - Low season: R1 557.15
 - High season: R2 721.11
- Average number of nights guest stay
 - Low season: 4.1
 - High season: 5.7
- Average number of clients and spend (restaurant and retail)
 - Low season: 6 084 and R246
 - High season: 14 768 and R716
- Average number of clients and spend(tour operators)
 - Low season: 2 512 and R1 999
 - High season: 5 824 and R5 219

Months regarded as high and low season

	Accommodation (n=125)		Restaurants and retail (n=125)		Tour Operators (n=66)	
	L	H	L	H	L	H
January	21.6	78.4	34.2	64.8	25.8	74.2
February	82.4	16.8	79.2	20.8	68.2	31.2
March	90.4	8.8	88.0	12.0	77.3	22.7
April	23.2	76.0	25.6	74.4	60.6	39.4
May	92.0	7.2	91.2	9.6	83.3	16.7
June	38.4	60.8	44.0	55.2	47.0	53.0
July	43.6	57.6	39.2	60.8	56.1	43.9
August	93.6	5.6	95.2	4.8	83.3	16.7
September	33.6	66.4	34.4	65.6	40.9	58.1
October	80.8	18.4	79.2	20.8	68.2	31.8
November	57.6	41.6	44.0	56.0	22.7	77.3
December	-	100	-	100	1.5	98.5

Income and expenditure (last year)

	Accommodation (n=125)	Restaurants and retail (n=125)	CMT Businesses (n=96)	Tour Operators (n=66)
Average income	4 461 711	3 192 500	2 561 585	5 171 085
Average total profit generated		1 675 127		2 265 698
Total average expenditure			1 443 294	
Average capital expenditure	357 454	229 706	300 035	345 630
Average salaries and wages expenditure	1 095 800	965 627	941 453	1 549 107
Average advertising and marketing expenditure	75 844	59 265	36 507	107 301
Average transport expenditure	37 524	43 483	31 023	180 643
Average other expenditure	119 257	118 667	200 583	179 500

Service providers

	Accommodation (n=125)	Restaurants and retail (n=125)	CMT Businesses (n=96)	Tour Operators (n=66)
Average number of service providers used	3	4.1	1.9	3.0
Average number of service providers who were local-based	3.3	3.8	2.0	2.5
Average number of service providers who were black-owned	1.7	3.5	1.3	.8
Average number of service providers who were	1.3	1.8	1.1	.9
Overall average amount paid to service providers	254956	292842	243054	302984

Number of permanent (P) and temporary/casual (T) staff employed

Number	Accommodation (n=125)		Restaurants and retail (n=125)		CMT Businesses (n=96)		Tour Operators (n=66)	
	P	T	P	T	P	T	P	T
< 5	59.2	48.8	43.2	32.0	62.8	44.7	39.4	21.2
5-9	24.0	5.6	28.8	17.6	25.5	6.4	28.8	15.2
10-19	5.6	6.4	12.8	15.2	10.6	3.2	22.7	15.2
20-49	5.6	8.8	9.6	4.0	1.1	2.1	7.6	6.1
50-100	4.0	-	1.6	.8	-	-	-	-
> 100	.8	.8	-	-	-	-	-	-
None	-	8.8	-	1.6	-	3.2	-	-
NR/NA	.8	20.8	4.0	28.8	-	40.4	1.5	42.4
AVERAGE	11.4	8.1	8.7	7.8	4.7	3.6	8.3	8.7

Averages for gender, race and location of employees

	Accommodation (n=125)		Restaurants and retail (n=125)		CMT Businesses (n=96)		Tour Operators (n=66)	
	P	T	P	T	P	T	P	T
Male	3.4	2.8	4.0	4.0	3.5	1.9	4.7	4.8
Female	4.4	4.6	6.0	5.4	2.6	2.0	4.1	4.1

	Accommodation (n=125)		Restaurants and retail (n=125)		CMT Businesses (n=96)		Tour Operators (n=66)	
	P	T	P	T	P	T	P	T
African	4.2	3	6.9	4.5	2.4	1.9	3.7	3.5
Coloured	2.6	2.5	2	2.3	1.8	2.5	2.5	2.9
White	2.2	2.1	2.5	3	3.4	2.4	4.1	2.7
Indian	2.1	2	2.5	3.2	1.3	1	2.8	NA
Foreign	1.5	3.6	2.8	4.1	1.7	1.7	2.1	2.7

	Accommodation (n=125)		Restaurants and retail (n=125)		CMT Businesses (n=96)		Tour Operators (n=66)	
	P	T	P	T	P	T	P	T
Local	5.2	3.5	7.5	6.6	3.9	2.4	6.6	4.6
Regional	2.4	2.6	2.9	2.6	3.5	4	3.3	3.9
National	2.2	3.3	2.1	2.5	2.1	2.5	3.5	2.1
International	1.4	5	2.2	4.1	1.5	2.7	1.4	2.4

Thank You! Siyabonga!



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