



Zulu Kingdom. Exceptional

TKZN DOMESTIC TOURISM SURVEY

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DOMESTIC TOURISM SURVEY



History of the Survey

Tourism KwaZulu-Natal (TKZN) has conducted a nationwide survey about domestic tourism since 2006. The OMNIBUS is a syndicated research service which offers clients the opportunity to save costs by cost sharing on a fully representative, personal interview-based, regular nation-wide survey.

Purpose



The objective of the study is to obtain insights into the behaviour of domestic tourists travelling to and within KwaZulu-Natal (KZN). South Africa Tourism (SAT) does provide statistics and information on domestic tourism. However, this information is limited in that, due to its nature, cannot provide all the insights and information that is useful at a provincial level, or even municipal level.

The omnibus survey seeks to:

- Ascertain the brand health of the “Zulu Kingdom” brand, travel patterns and provincial perceptions by South Africans overall, according to the sample
- Ascertain the brand health of the “Zulu Kingdom” brand, travel patterns and provincial perceptions by South Africans who travelled to KZN
- Ascertain recognition and associations of the “Zulu Kingdom” brand
- Ascertain liking or intention to visit/recommend KZN as a destination
- Ascertain perceptions of the positioning statement used in the “Zulu Kingdom” brand; and
- Test for general recognition of and perception about KZN as a domestic holiday destination; a conference or business breakaway; an entertainment or social event destination

Methodology

- Development of the questionnaire
- A series of questions were asked of the respondents,.
- The data was weighted using the 2016 Statistics South Africa's community survey population data.
- Quantitative face to face CAPI.
- Sample: 1500 nationally, Stratified by race and gender

Methodology

Province	Percentage of sample	Sample size
Eastern Cape	10,4%	156
Free State	4,9%	74
Gauteng	28,7%	431
KwaZulu-Natal	18,7%	281
Limpopo	9,3%	139
Mpumalanga	7,7%	116
North West	7,0%	105
Northern Cape	2,2%	32
Western Cape	11,1%	166
TOTAL	100%	1500

Methodology

- Random walk procedure to select the household
- Kish Grid to select the respondent
- Pilot study
- Back checking



Results

Demographic data



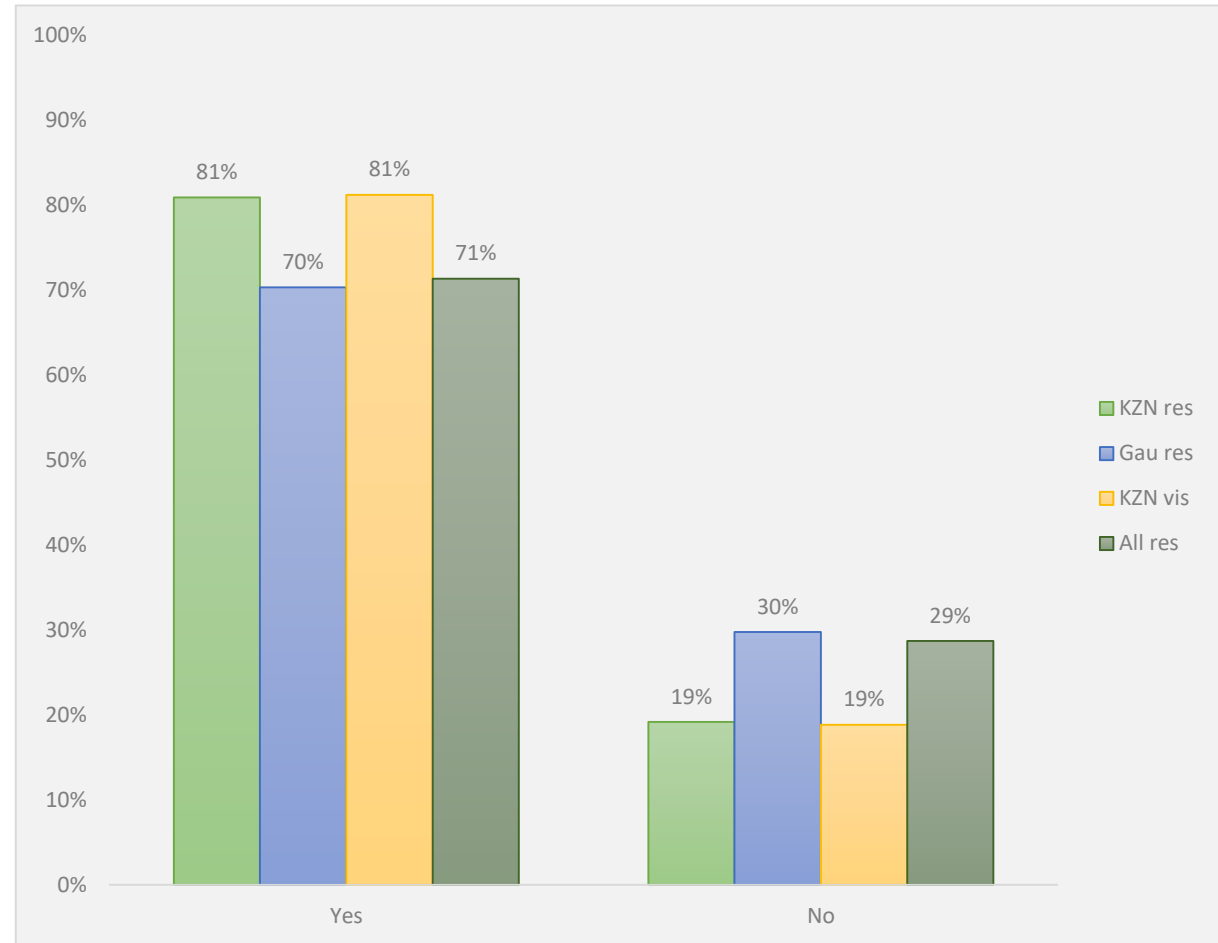
Results

Destination Province	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
KZN	28%	19%	20%	20%
Gauteng	16%	17%	17%	17%
Eastern Cape	9%	9%	10%	9%
Western Cape	16%	14%	16%	16%
Mpumalanga	7%	9%	8%	8%
North West	5%	9%	7%	7%
Limpopo	7%	8%	7%	7%
Northern Cape	8%	8%	10%	9%
Free State	4%	6%	6%	6%

Results

Destination	KZN Resident	Gauteng Resident	KZN Visitor	All Respondents
Durban	72%	54%	36%	38%
PMB / Midlands	22%	21%	12%	12%
South Coast	39%	20%	13%	13%
North Coast	15%	14%	9%	8%
Zululand	13%	23%	13%	12%
Drakensberg	8%	14%	8%	8%
Elephant Coast	3%	11%	5%	5%
Battlefields	3%	12%	6%	5%

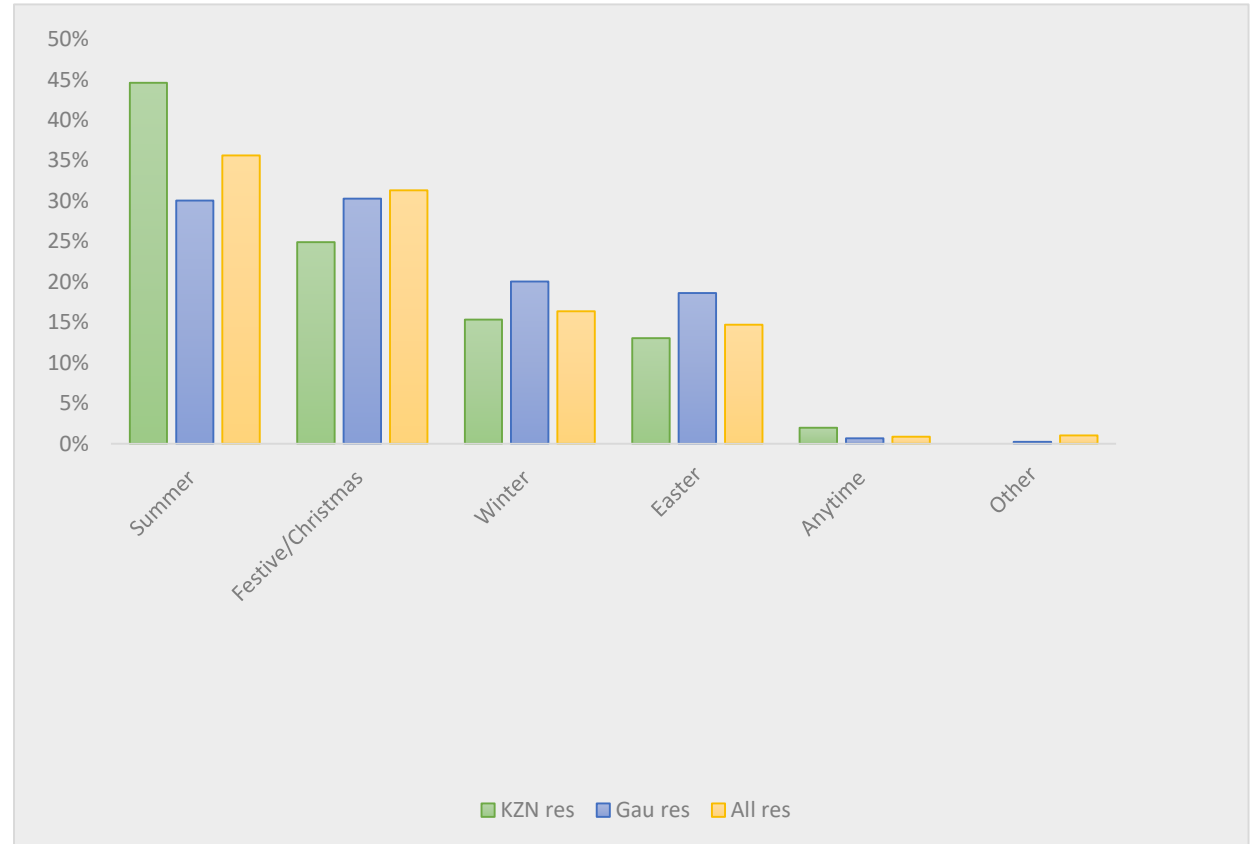
Results



Results

Overnight Trips	KZN Resident	Gauteng Resident	All Respondents
Yes	35%	40%	34%
No	65%	60%	66%

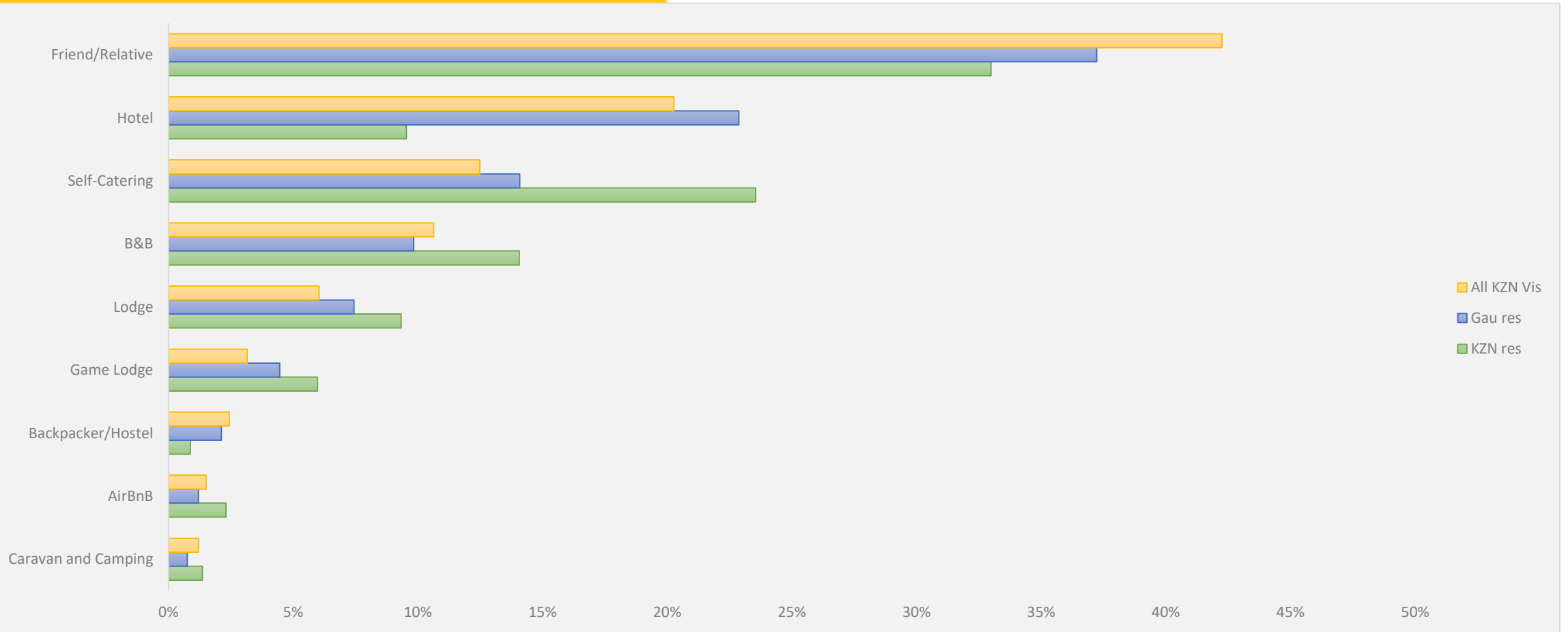
Results



Results

Transport	KZN Resident	Gauteng Resident	All KZN Visitors
Airplane	2%	17%	23%
Bus	7%	19%	17%
Private Vehicle	49%	40%	38%
Motorcycle	3%	0%	1%
Mini-Bus Taxi	40%	18%	18%
Train	0%	6%	4%
Other	0%	0%	0%

Results



Results

Destinations	All KZN Visitors
Durban	74%
PMB / Midlands	18%
Battlefields	18%
South Coast	14%
Zululand	13%
Drakensberg	10%
North Coast	7%
Elephant Coast	1%

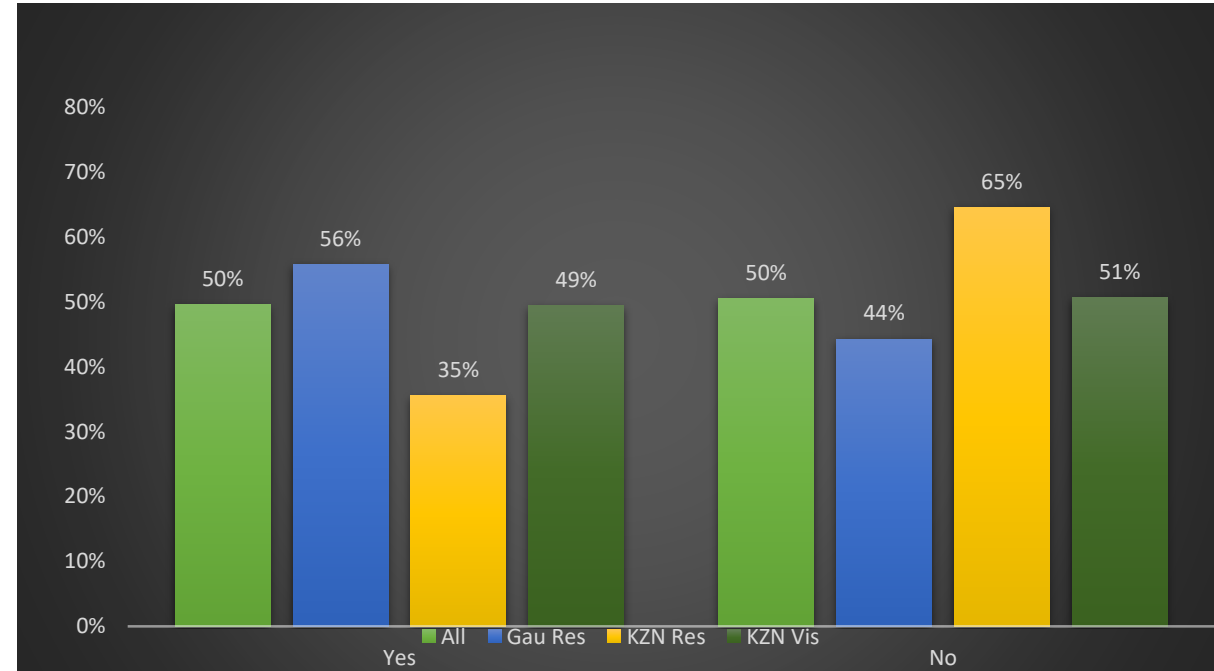
Results

Main Purpose	All KZN Visitors
VFR	45%
Holiday	44%
Business	7%
Wedding/Birthday	2%
Other	2,1%

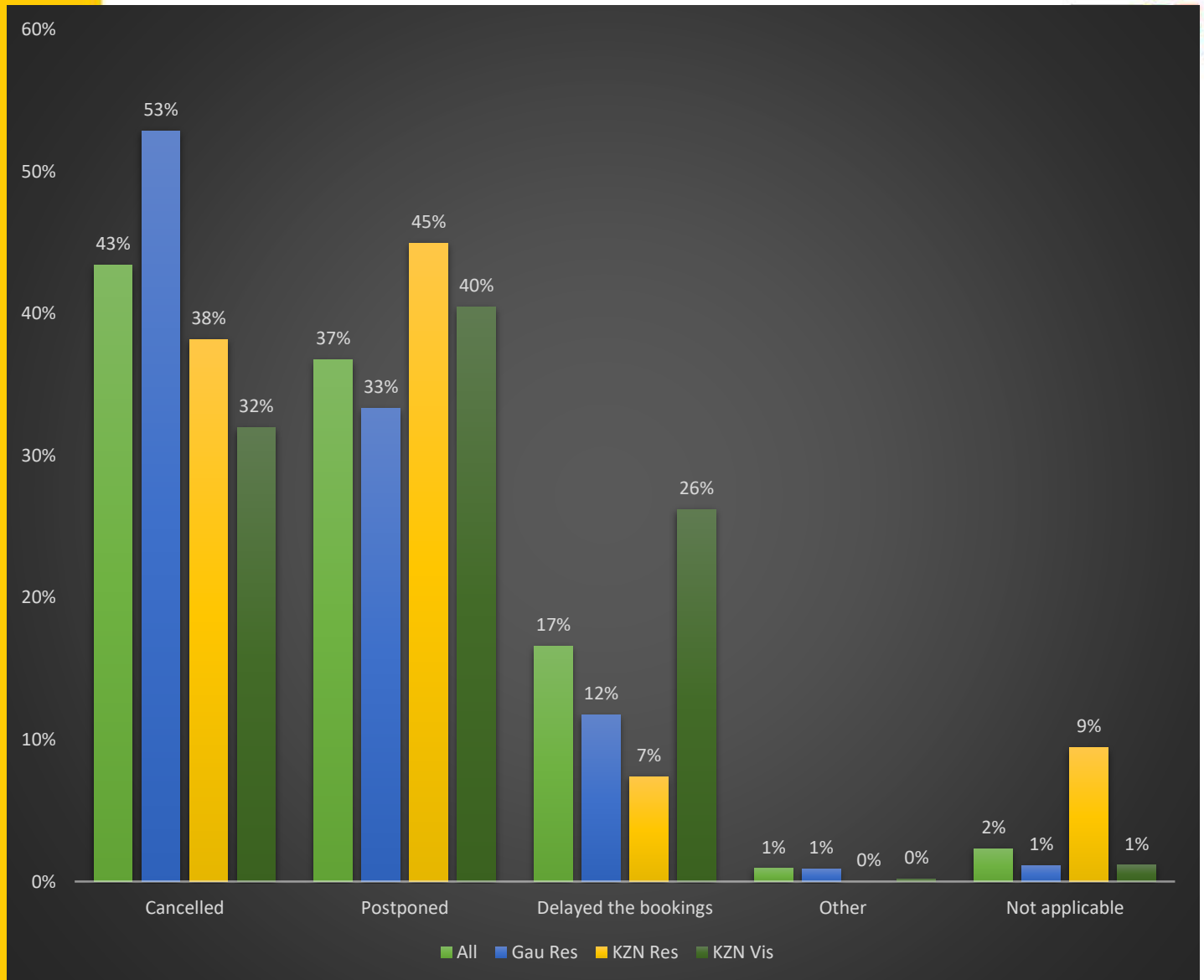
Results

Length of Stay	All KZN Visitors
Day trip	0%
1 Night	10%
2 Nights	20%
3 Nights	17%
4 Nights	10%
5 Nights	15%
6 Nights	6%
7 Nights	3%
8 Nights	4%
9 Nights	2%
10+ Nights	11%

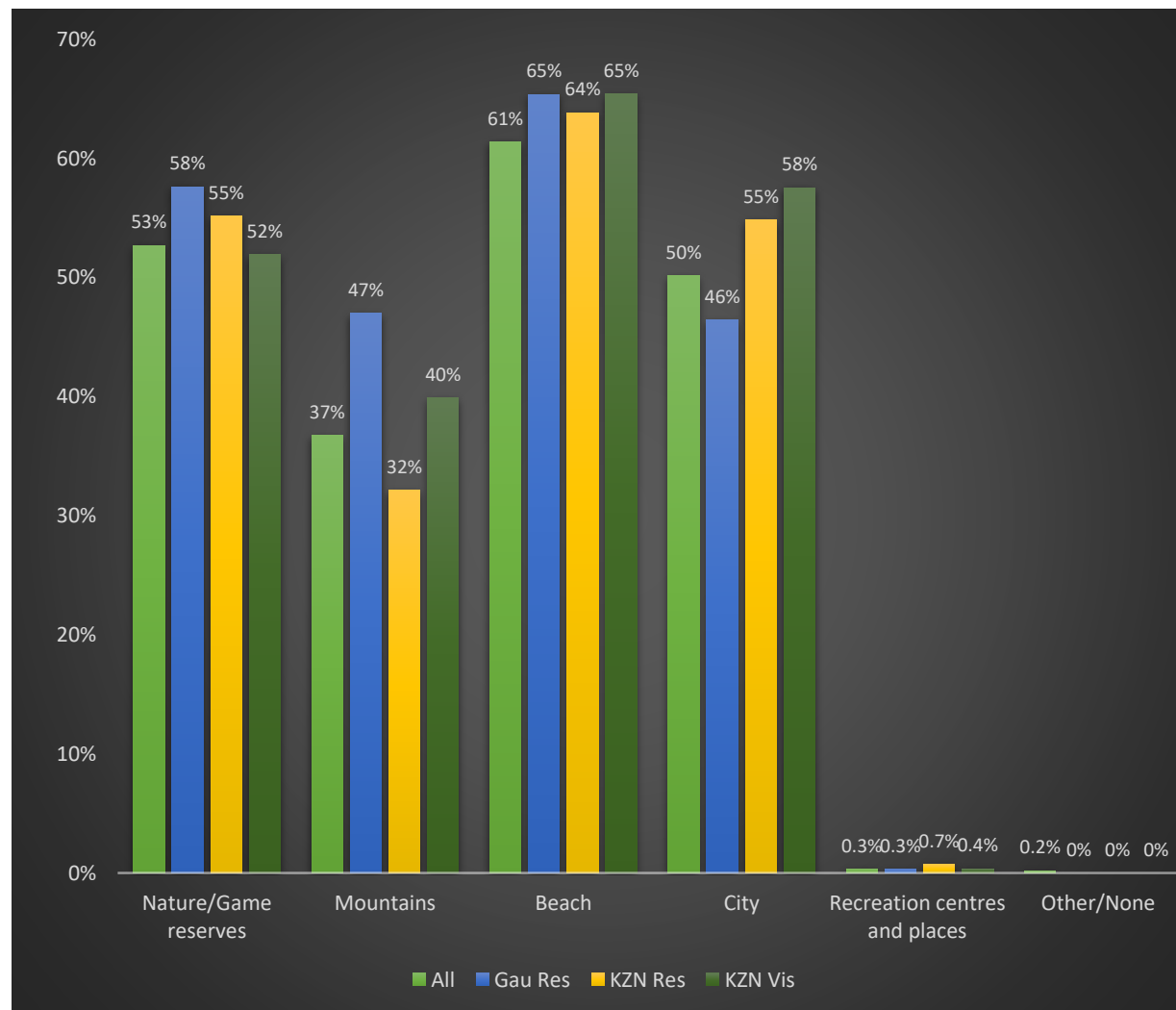
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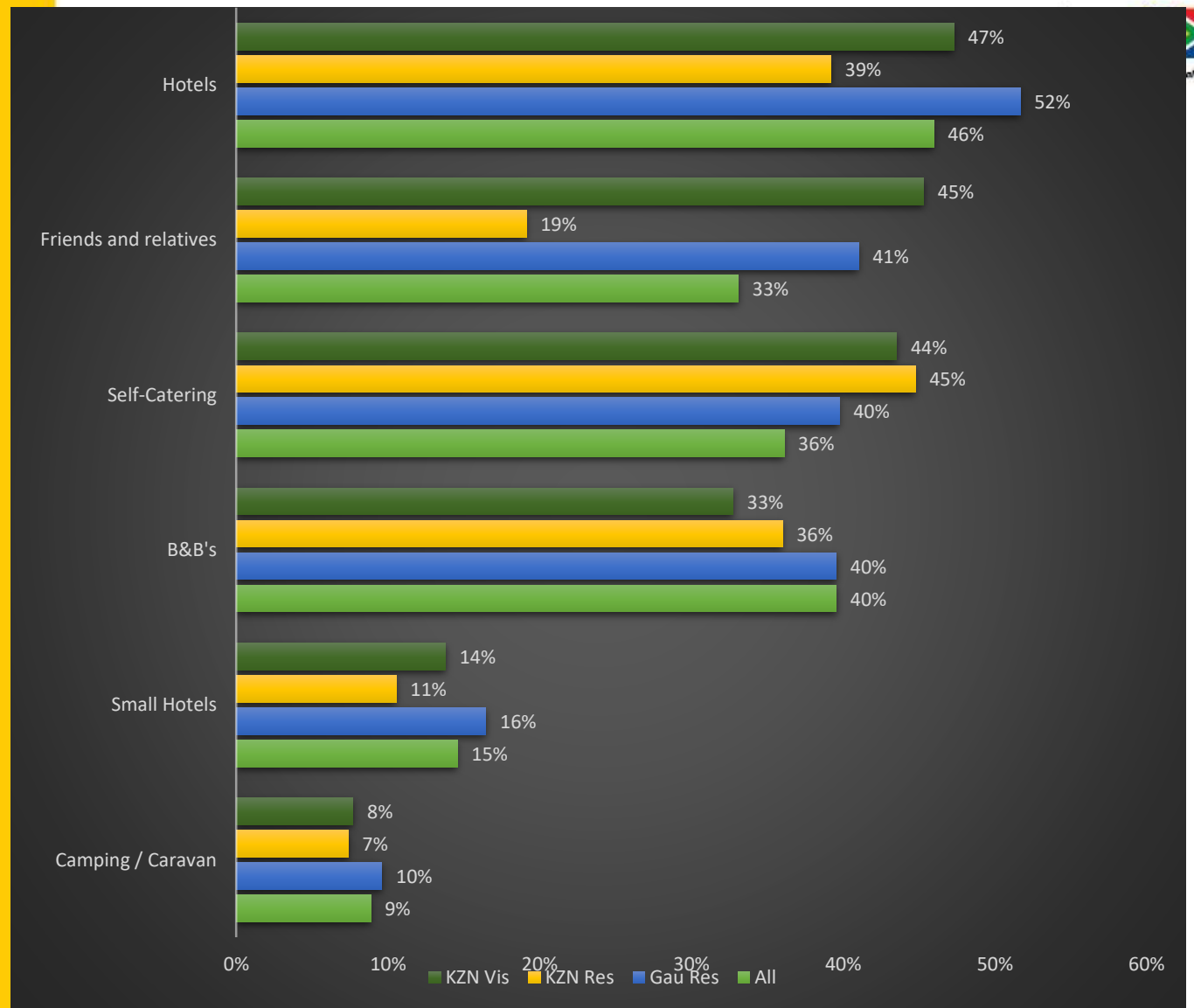
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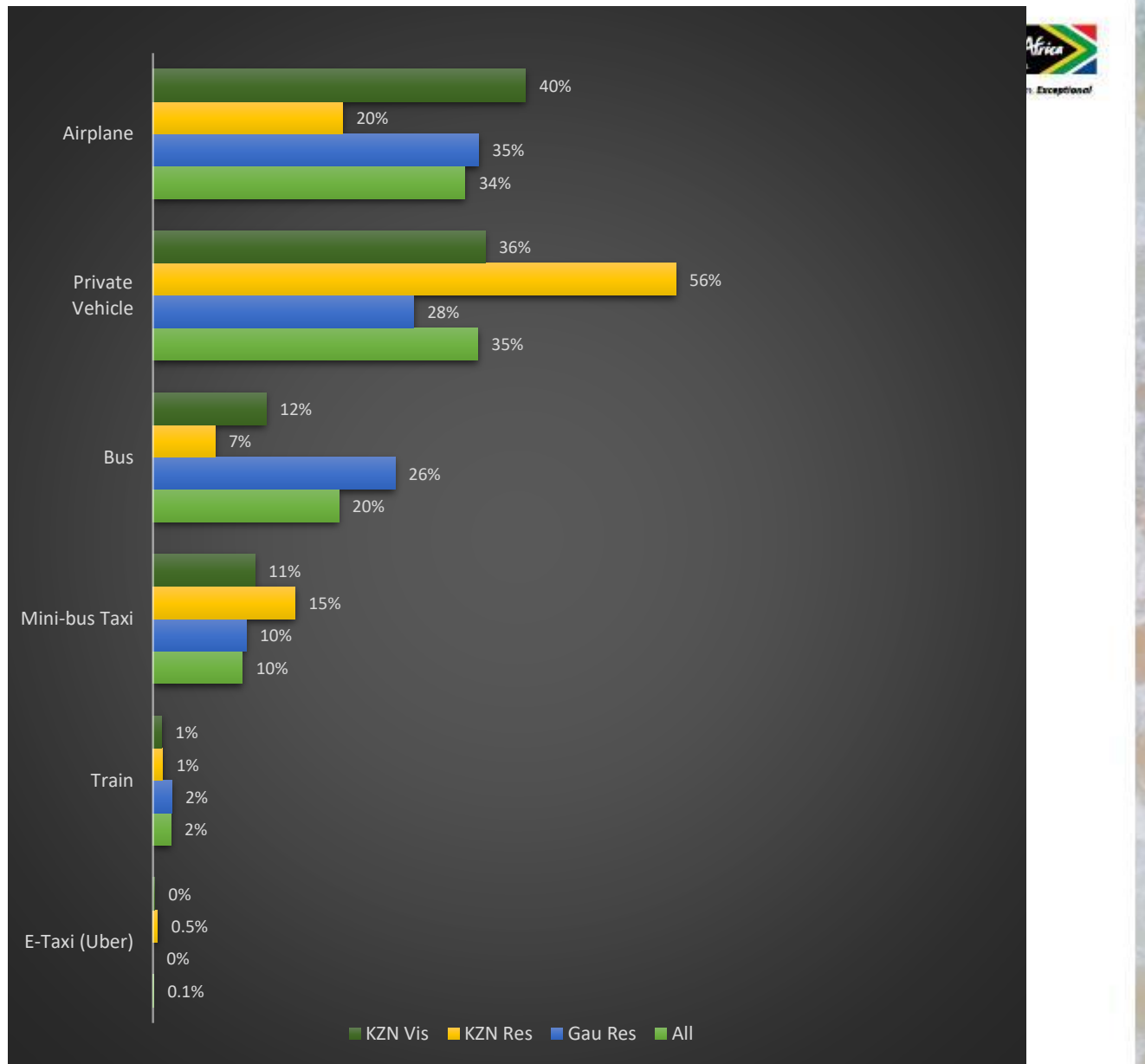
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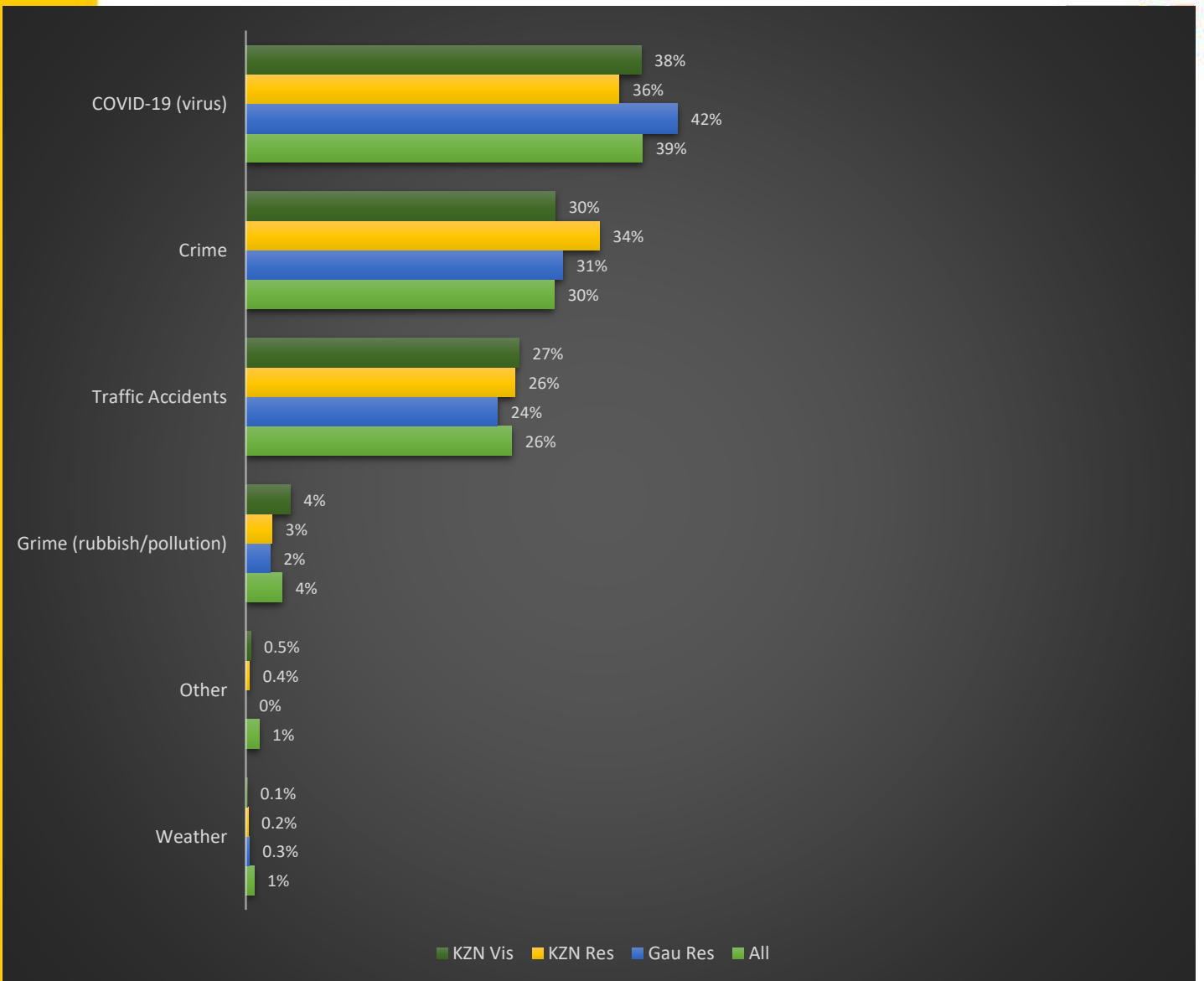
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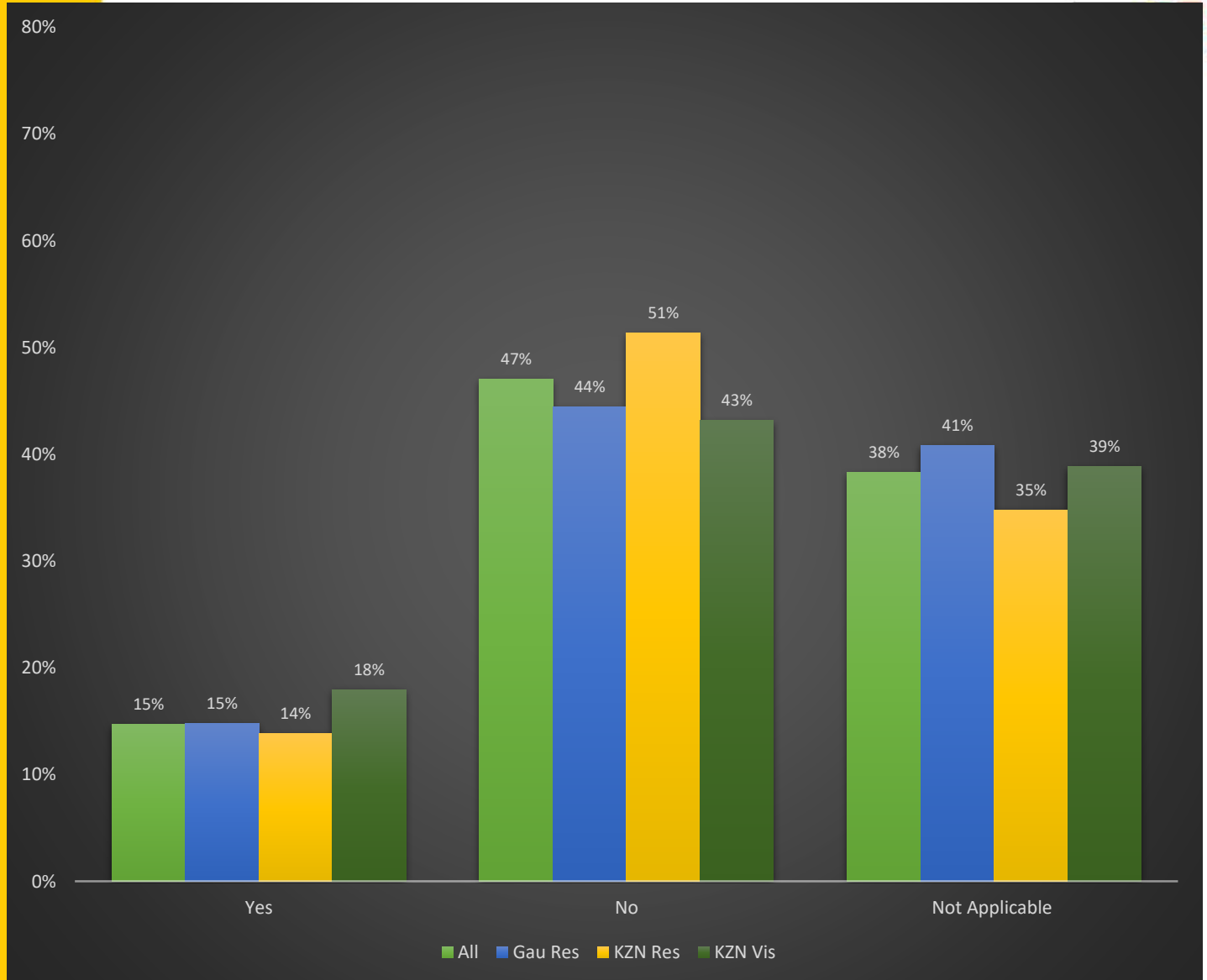
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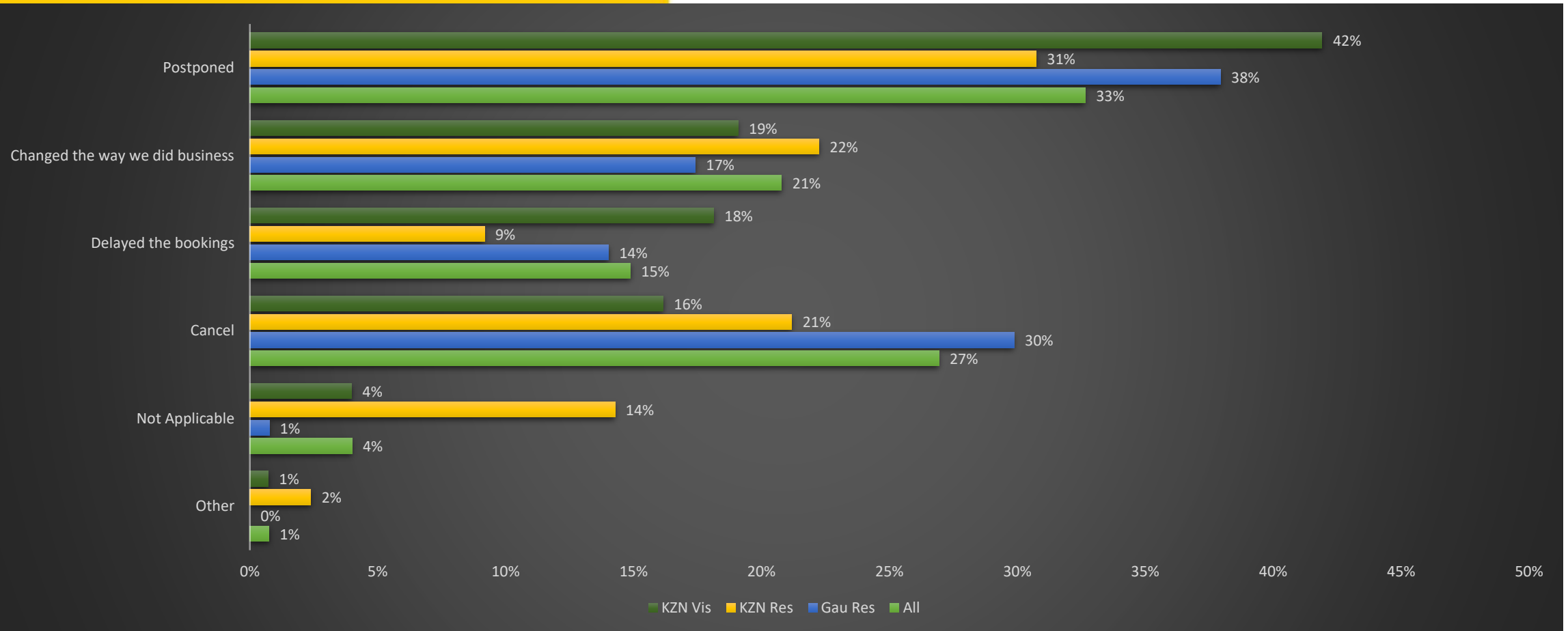
Results



Results



Results



Stakeholders

Internal

- EXCO
- OPSCO
- Marketing

External

- Public (Website)

Thank You