



Tourism KwaZulu-Natal Statistics Report

Crystell Kameel Maniklall

Wayne Tifflin

Tourism KwaZulu-Natal

December 2023

DISCLAIMER

It is important to note that this 2022 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:

1. Mr Wayne Tifflin, Acting Research Manager, on wayne@zulu.org.za

Statistics for the Tourism Sector (2022)

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

Global Foreign Tourism Market 2022

	World	Africa	South Africa	KZN
Size	917 mn ¹	45 mn ¹	5.7 mn ³	±600 000 ³
Growth (%)	-37% ¹	-35% ¹	-44% ³	107% ³
Direct Spend (Tourism Receipts)	U\$1.073bn ¹ UNWTO DASHBOARD	U\$11.7bn ¹ UNWTO DASHBOARD	R59.6 bn ³	R4.2 bn ³
Daily Spend			R829 ³	R719 ³
Average Stay (nights)			12.6 nights ³	11 nights ³

[Source: UNWTO 2022 September Barometer¹, WTTC², SAT³]

Global Tourism Contribution 2022

	World	Africa	South Africa	KZN
Directly Employed				±140 225***
Total Contribution to GDP %	WTTC 7.6%*	±36.7%#	±5.8%#	±5.2%#
Direct Contribution to GDP (Foreign + Domestic)			±R158.8bn**	±R24.1bn***

[Source: WTTC 2022*, SAT**, TKZN***, Stats SA**** derived from GDPR for KZN Current Prices - domestic and international[†] STATSSA derived from GDPR for KZN Constant Prices, ^using multiplier of 2, #IHS Global Insight]

Global Tourism: International Tourism Receipts 2022 (US\$ billion)	Percentage change vs 2021 (%)	Receipts per Arrival (US\$ billion)	
1. Europe	±553 USD	72%	930 USD
2. Americas	±255 USD	69.2%	1630 USD
3. Asia and the Pacific	±134 USD	52.1%	1315 USD
4. Middle East	±118 USD	106.5%	1703 USD
5. Africa	±12 USD	104.1%	252 USD

[Source: UNTWO Tourism Dashboard 2022]

South Africa

The South African Foreign Picture 2022:

Number of Foreign Arrivals: 5.7 mn (increase of 40.3%)

Spend (pppd): R829

Total Spend: R59.6 bn

Average length of stay: 12.6 nights

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

Spend Proportion: Foreign vs Domestic = 38% vs 62%*

[Source: SAT 2022, *WTTC 2022]

South Africa's Regional Tourist Markets 2022 (Actual & Share):

	Arrivals	Share
1. Africa	4 237 261	74.4%
2. Europe	900 703	15.8%
3. Americas	326 200	5.7%
4. Asia	117 852	2%
5. Australasia	65 288	1.4%
6. Middle East	40 628	0.7%

[Source: SAT 2022]

South Africa's Top 5 Overseas (Long Haul) Tourist Markets 2022:

1. UK	283 031
2. USA	262 183
3. Germany	173 146
4. Netherlands	90 289
5. France	76 077

[Source: SAT 2022]

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

1. Argentina	R34 600
2. Angola	R34 600
3. Democratic Republic of Congo	R34 600
4. Finland	R33 700
5. Other Central and South America	R33 000
6. Switzerland	R32 100
7. Other Middle East*	R31 200
8. China including Hong Kong	R31 000
9. Brazil	R30 900
10. Chile	R30 900

[Source: SAT 2022] [*Other Middle East – excluding UAE]

Purpose of Visit to South Africa (All Foreign Tourists) 2022:

VFR	43%
Holiday	16.6%
Shopping Personal	4.7%
Shopping Business	12.3%
MICE	3.9%
Business Travel	8.8%
Medical	1.5%
Religion	0,9%

[Source: SAT 2022]

Age Groups (All Foreign Tourists) 2022:

18-24	12.1%
25-30	19.2%
31-34	16.7%
35-40	18.2%
41-50	20.7%
51-60	8.3%
60+	4.0%

[Source: SAT 2022]

Number of Visits to South Africa (LBP* Only) 2022:

First Time	18.1%
2-3 Times	12.6%
4-9 Times	16%
10 or more	28.2%

[Source: SAT 2022], *Land Border Ports

South Africa's Annual Overseas (Long Haul) Visitor Arrivals (1980-2022):

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

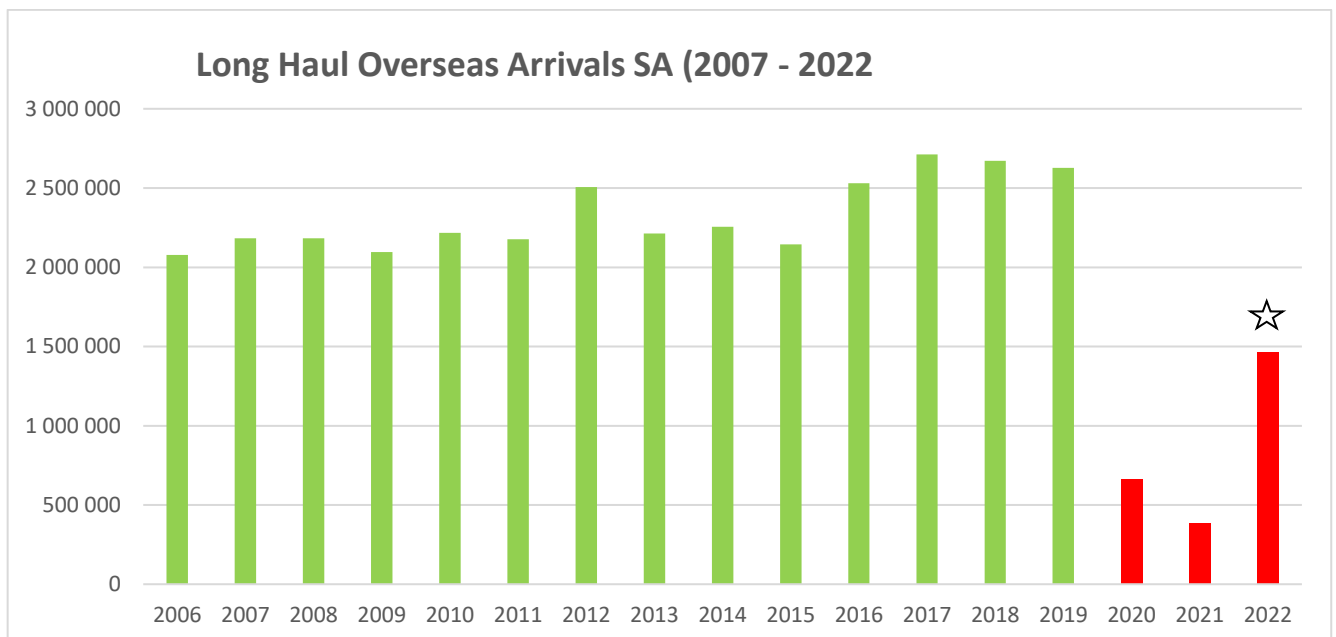
1999: 1 491 059
2000: 1 517 768
2001: 1 502 090
2002: 1 803 887
2003: 1 879 110
2004: 1 884 336
2005: 1 939 214
2006: 2 078 704
2007: 2 183 319
2008: 2 182 130
2009: 2 095 325#
2010: 2 216 994
2011: 2 176 179
2012: 2 505 762
2013: 2 213 134*
2014: 2 254 709*
2015: 2 144 988
2016: 2 531 046
2017: 2 713 133
2018: 2 672 146
2019: 2 627 750
2020: 664 796^
2021: 382 090^
2022: 1 460 801^

[Source: SAT 2023]

#Methodology change, day visitors now omitted from totals

*Methodology change, transits now omitted from totals

^COVID-19 pandemic



[Source: SAT 2022, ***2009**: Methodology Change (day visitors now omitted from totals), **2013/2014**: Methodology Change (day visitors and transits now omitted from totals), and **2021**: major decline in arrivals due to the COVID-19 pandemic]

The South African Domestic Tourism Picture 2022:

Number of Trips: 34mn trips / ±32mn travellers (increase of 43.5%)

Spend (per trip): ±R3 062

Spend (total market value): R99.2bn direct spend

Average length of stay: 3.5 nights

Main source markets: Gauteng, Limpopo, KZN, E Cape, and W Cape.

[Source: SAT 2022]

Purpose of Trip (All Domestic Tourists) 2022:

VFR	44.3%
Holiday	27.0%
Religious	4.5%
MICE	3.3%
Medical	0.6%
Business travel	5.1%

[Source: SAT 2022]

Top 5 South African Domestic Tourism Source Markets 2022:

1. Gauteng	6 905 621
2. Limpopo	5 978 995
3. KwaZulu-Natal	5 614 346
4. Eastern Cape	4 829 665
5. Western Cape	3 205 947

[Source: SAT 2022]

KwaZulu-Natal

KwaZulu-Natal - The Foreign Tourist Picture 2022:

Number of Visitors: ±554 156 (increase of 48.2%)

Average Spend (pppd): R719 per day

Spend (Total Market Value): R4.2bn

Main Overseas Source Markets (arrivals): UK, USA, Germany, France, India

[Source: SAT 2022]

KwaZulu-Natal's Top Ten Foreign Tourism Source Markets 2022

Source Country	Arrivals	Share (%)	Growth (%)
1. Zimbabwe	151 123	27.3%	408.4%
2. Swaziland	137 996	24.9%	-56.5%
3. Zambia	43 316	8%	176.3%
4. UK	33 207	6%	-20.5%
5. USA	24 444	4.4%	-32.6%
6. Lesotho	24 365	4.4%	-40.6%
7. Germany	18 257	3.3%	-58.5%
8. France	9 960	1.8%	-62.1%

9. India	9 495	1.7%	-10.2%
10. Australia	9 407	1.7%	-40.2%

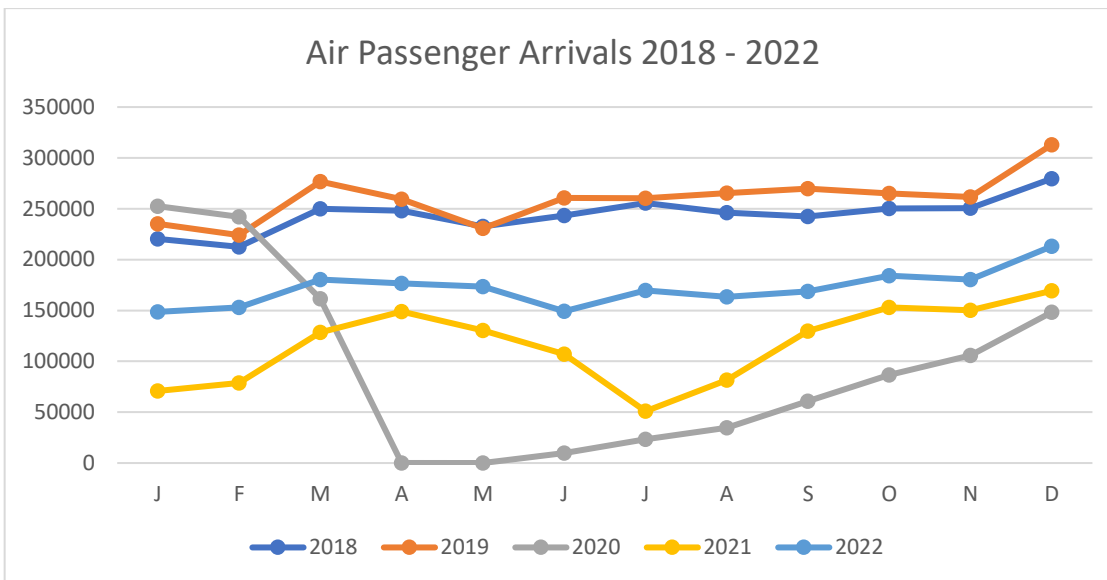
[Source: SAT 2022]

KwaZulu-Natal's Top 6 Long Haul Source Markets (2017 - 2022)

2022	2021	2020	2019	2018	2017
1. UK	1. UK	1. UK	1. UK	1. UK	1. UK
2. USA	2. USA	2. Germany	2. Germany	2. Germany	2. Germany
3. Germany	3. Germany	3. USA	3. USA	3. USA	3. USA
4. India	4. France	4. France	4. France	4. France	4. France
5. Australia	5. Netherlands	5. Netherlands	5. Netherlands	5. Netherlands	5. Netherlands
6. Netherlands	6. India	-	6. Australia	6. Australia	6. India

[Source: SAT 2022]

Monthly Air Passenger Arrivals to KZN (2017-2022)



[Source: ACSA 2022]

KZN - The Domestic Tourist Picture 2022

Number of Trips: ±7.5mn trips

Average spend per trip: ±R3 544

Spend (Total Direct Value): ±R22.8bn

[Source: SAT 2022]

KZN: Top 5 Domestic Source Markets and Trips 2022

Source Province	No. of Trips
1. KZN	5 420 114
2. Gauteng	754 277
3. E. Cape	300 514
4. Mpumalanga	247 363
5. Limpopo	37 487

[Source: SAT 2022]

KZN: Top Source Markets for Holiday Makers 2021

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

[Source: TKZN Omnibus Study 2022]

Purpose of Visit to KZN (All Domestic Visitors) 2022

Purpose	Share of Trips (%)
Holiday	59%
VFR	52%
Business	18%
Events	5%
Other	5%

[Source: TKZN Omnibus Study 2023]

Time of Visit (Months) 2021:

Month	% of Trips
January	7%
February	6%
March	5%
April	10%
May	5%
June	12%
July	5%
August	6%
September	9%
October	6%
November	7%
December	23%

[Source: TKZN Omnibus Study 2023]

Activities Undertaken in KZN (All Domestic Visitors) 2022:

Activity	%
Go to the beach	49%
Visit an African township or culture village on a tour	8%
Visit a museum, art gallery or historic building	7%
Food and wine fair	23%
Visit a health spa	17%
Visit a nature or wildlife or game reserve	7%
Go to a live show, theatre, or concert	6%
Visit an arts or craft outlet	5%
Watch a live sport event	9%
Go hiking or mountain climbing	9%
Art and crafts festival	6%
See bushman paintings	3%

Bird watching	6%
Attend conference workshop or training season	5%
Horse riding	4%
Tour of the battlefields	3%
Mountain biking or other cycling	5%
Go backpack/hostel travelling	3%
Fly-fishing or other fishing	7%

[Source: TKZN Omnibus Study 2022]

Average Trips to Destinations in 2021:

DBN – 1.9

No. of Trips	Share (%)
1 Trip	49%
2 Trips	32%
3 Trips	11%
4 Trips	3%
5 Trips	3%

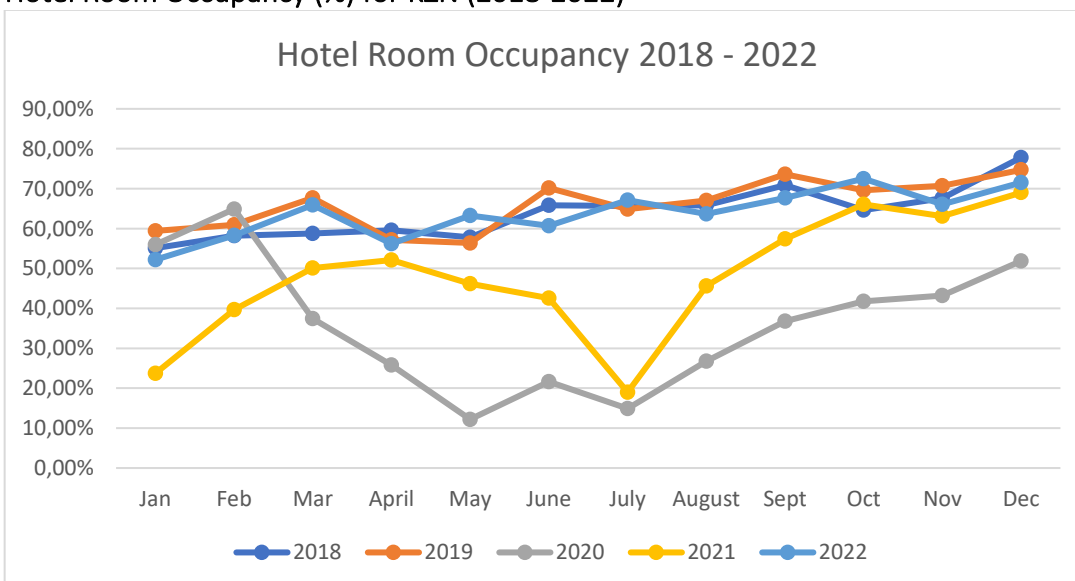
[Source: TKZN Omnibus Study 2022]

Domestic Trips to Destinations in KZN 2022:

Destination	Share (%)
Durban	56%
Zululand	14%
South Coast	19%
PMB / Midlands	11%
Battlefields	9%
Elephant Coast	1%
North Coast	8%
Drakensberg	5%
Uncertain	3%

[Source: TKZN Omnibus Study 2022]

Hotel Room Occupancy (%) for KZN (2018-2022)



[Source: STR Global 2022]

Accommodation Types (All Domestic Visitors) 2022:

Accommodation	% Share
VFR*	38%
Hotel	21%
B&B / Guest House/ Country House	12%
Self-Catering	11%
Airbnb	7%
Lodge	6%
Game Lodge	4%

[Source: TKZN Omnibus Study 2023] // *VFR = Visiting Friends and Relatives

Length of Stay (All Domestic Visitors) 2022:

Year	Number of Nights
2018	4,5
2019	2,8
2020	3,7
2021	3,8
2022	3,4

[Source: SAT]

KwaZulu-Natal Supply Statistics 2022

Supply Category	No.
Hotels	255
Guest Houses	317
Lodges	210
Bed and Breakfasts	547
Caravan and Camping Sites	87
Self-Catering	687
Youth Hostels/Backpackers	35
Conference Venues	322
Tourist Guides	1225

[Source: TKZN 2022]

KZN's International and Domestic Segmentation 2014-2022

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

[Source: TKZN 2017]

KZN Provincial Information

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

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



iSimangaliso Wetland Park, a World Heritage Site	
Location	North-eastern coast of KwaZulu-Natal, South Africa
Date of Inscription	December 1999
Criteria	Unique ecological processes, superlative natural phenomena, biodiversity
Size	332 000 ha, 220 kms of coastline
Highest Elevation	Mt Tabor 130m on the Eastern Shores coast, Nyathikazi 159m on the northern coast, Maphelane sand dune 183m, oKhombe 474m and Lebombo Mountains 776m
Brief description	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
Climate	Sub-tropical. Summer 17-28 °C, Winter 11 – 25 °C, average rainfall 650-800mm inland, 1200-1300mm on the coast.
Facilities	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).
Activities	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.
Visitor Numbers	Annual total 2015: ±500 000
Animal Species / Numbers	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.
Bird Species / Numbers	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 twinspot, Rosy-throated longclaw
Other	2 185 vascular plants; 325 seaweeds

[Source: iSimangaliso 2017]

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

[Source: TKZN 2017]