

# REVIEW OF DURBAN TOURISM VISITOR MARKETING STRATEGY

2022 – 2026

# Introduction

- The Durban Visitor Marketing Strategy provides strategic direction for growing Durban's visitor arrivals, receipts, length of stay and spend over the next 5 years
- **The following elements formed the basis of this strategy:-**
  - Culture – history – Heritage
  - Beach Destination
  - Events
  - Mice
  - Source markets

## **This strategy has been aligned to the:-**

- The National Sector Strategy
- The KwaZulu National Provincial Master plan
- The South African Tourism Visitor Strategy
- The South African Brand Strategy.

# Strategic Framework

- **Role:** The Durban Visitor Marketing Strategy provides strategic direction for growing Durban's visitor arrivals, receipts, length of stay and spend over the next 5 years
- **The goal** is to establish a long-term sustainable tourism sector that generates tourism revenues for Durban, while building a resilient visitor economy against future crises such as Covid-19
- **Vision:** *"To be the most favoured beach, recreation, holiday and business events destination in Africa and be positioned as the "playground of Africa".*
- **Mission:**  
**Domestic Tourism** to increase to over 3.1 million visitors with a spend of R 7.7 billion – assumptions based on post covid with an average percentage growth of 2% yoy.  
**International tourism** target to reach over 346 000 visitors with a spend of R 2.37 billion and a growth rate of 10% by 2026.

# Strategic Intent

## Vision

To be the most favoured beach, recreation, holiday and business events destination in Africa and be positioned as "the playground of Africa "

## Mission

To develop and offer sustainable beach and city tourism experiences built on fun, leisure, recreation, culture and hospitality all year round

## Value Proposition

### Warmth

- Warm people, weather and sea

### Fun

Beach, Sport, Recreation, family, Nightlife, Culture, Heritage & more

### • Progressive

• Business Events, Lifestyle

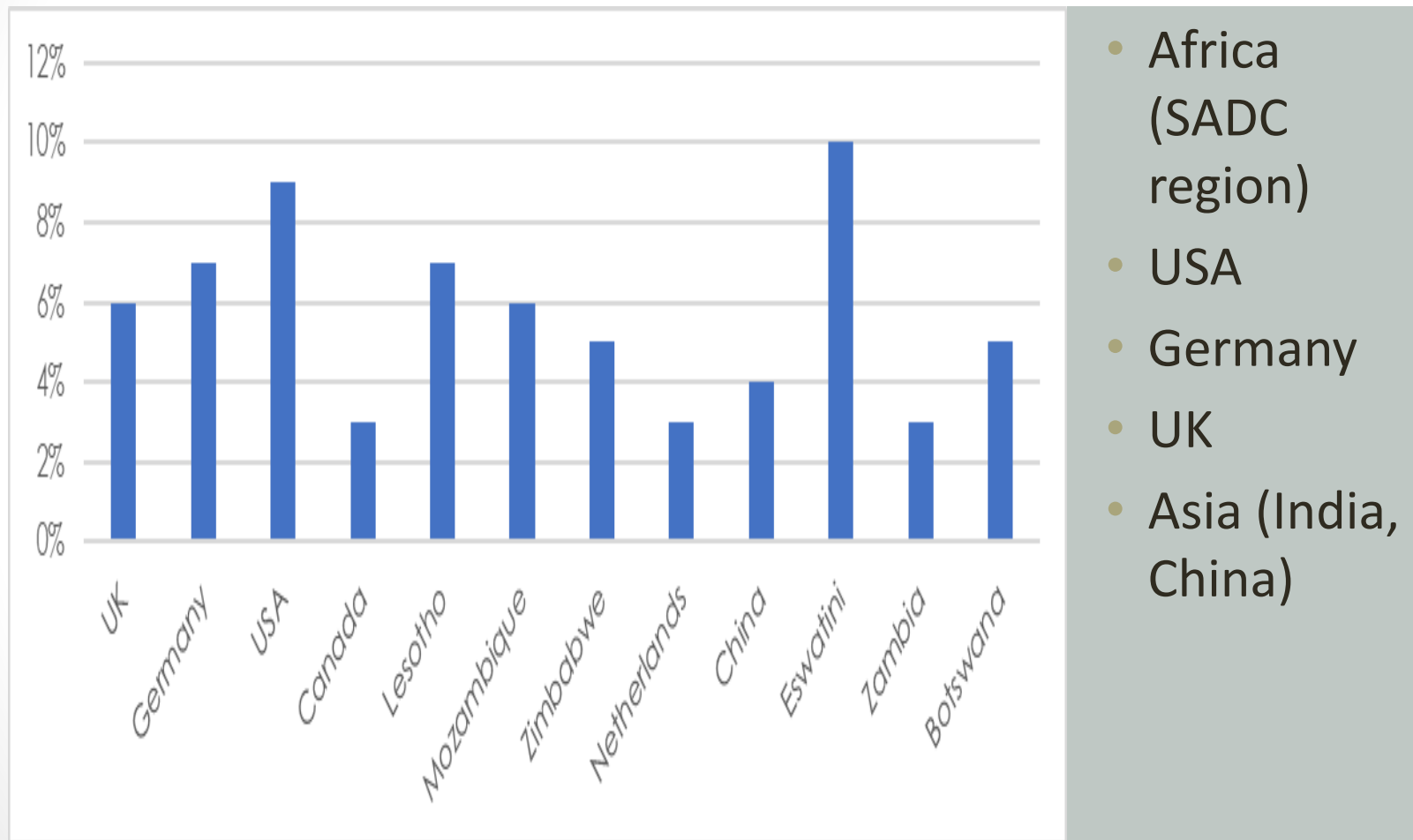
• Sustainability &

• Infrastructure

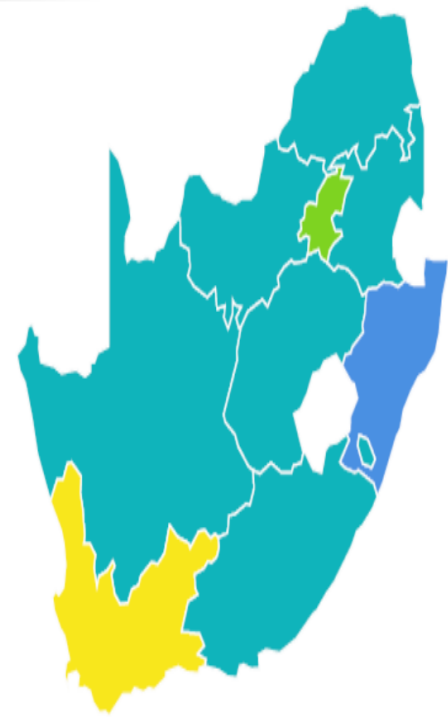
# Objectives of the strategy

Objectives	Strategic Imperatives
<b>Objective 1</b>	To facilitate cooperative marketing with private sector and other sister public entities through a whole-municipality approach to visitor marketing, perception management and brand equity building.
<b>Objective 2</b>	To promote Durban as a city tourist destination and improve tourism's contribution to the municipality's GDP and create more employment.
<b>Objective 3</b>	To secure emotional links to and loyalty of visitors in order to accelerate industry recovery - grow arrivals, increase length of stay, expand geographic dispersal and increase average spend per visitor.

# International & Regional Source Markets



# Domestic Source Markets



Province	2017	2018	2019	2020	2021
KZN	41%	25%	38%	54%	55%
Eastern Cape	5%	6%	6%	4%	5%
Free State	6%	7%	4%	6%	4%
Gauteng	26%	34%	31%	24%	23%
Limpopo	3%	4%	3%	2%	2%
Mpumalanga	4%	5%	4%	3%	3%
North West	2%	4%	2%	1%	1%
Northern Cape	2%	2%	2%	1%	1%
Western Cape	11%	13%	11%	5%	5%

KZN and Gauteng are the main source markets and the rest of South Africa

# Guiding Principles of Strategy





# Route to Market

## PROPOSED PRICING AND DISTRIBUTION CONSIDERATIONS

Key Destination Pricing  
Considerations

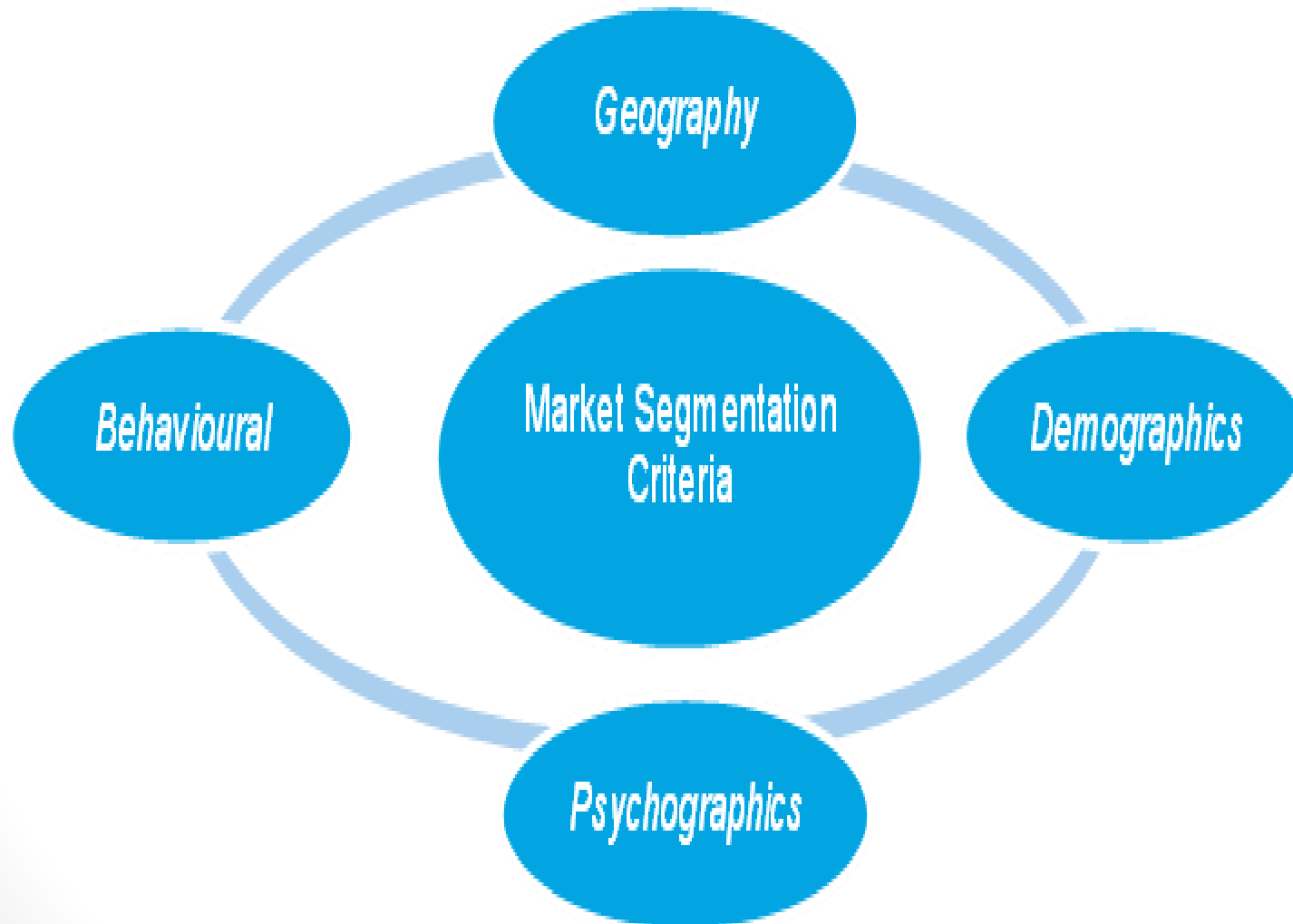
Partnership with Commissionable  
Systems Differential Pricing  
Seasonal Pricing Auction Pricing  
Model

Key Destination

Distribution model

- Domestic wholesale & retail travel trade
- Long-haul wholesale & retail trade
- OTAs – Travel start & Expedia
- Inbound Travel DMCs
- Special Interest Channels. Inclusive of Durban
- Specialist Programmes & Airline Partnership

# Market segmentation



# Target Audience

Priority 1  
Active Buzz  
Seekers  
25 - 34 Years

Priority 2  
Affluent  
Trendsetters 1  
35 - 44 years

Priority 3  
Affluent  
Trendsetters 2  
45 -54 years

Priority 4  
Youth  
Travellers  
18-24 Years

Priority 5  
Curious explorers &  
relax sight-seekers  
55 to 65 & 65 plus

Cross-cutting  
segment 1  
Business Events &  
Business Traveller

Cross-cutting  
Segment 2  
The untravelled

# DOMESTIC TOURISM PROJECTIONS: 2022 – 2026

Year	2022	2023	2024	2025	2026
Low Road Scenario					
Number of tourists	2 768 066	2 941 070	2 970 481	3 000 186	3 030 188
% Growth	32.9%	6.3%	1.0%	1.0%	1.0%
% Of pre-COVID average (2017-2019)	80%	85%	86%	87%	88%
eThekwini growth above SA GDP	N/A	N/A	-0.5%	-0.5%	-0.5%
SA GDP growth (mid-term budget 2021)	1.8%	1.6%	1.5%	1.5%	1.5%
Average trip spend	R2 073	R2 163	R2 256	R2 353	R2 454
Total direct expenditure (billions)	R5.7	R6.4	R6.7	R7.1	R7.4
High Road Scenario					
Number of tourists	2 941 070	3 460 083	3 546 585	3 635 250	3 726 131
% Growth	41.2%	17.6%	2.5%	2.5%	2.5%
% Of pre-COVID average (2017-2019)	85%	100%	103%	105%	108%
eThekwini growth above SA GDP	N/A	N/A	1.0%	1.0%	1.0%
SA GDP growth (mid-term budget 2021)	1.8%	1.6%	1.5%	1.5%	1.5%
Average trip spend	R2 073	R2 163	R2 256	R2 353	R2 454
<b>Total direct expenditure (billions)</b>	R6.1	R7.5	R8.0	R8.6	R9.1

# INTERNATIONAL TOURISM PROJECTIONS: 2022 - 2026

Year	2022	2023	2024	2025	2026
<b>Low Road Scenario</b>					
Number of tourists	123 093	169 253	215 413	276 959	307 732
% growth	83.7%	37.5%	27.3%	28.6%	11.1%
% of pre-COVID average	40%	55%	70%	90%	100%
% share of total tourists to eThekwi	4%	5%	7%	8%	9%
Domestic tourists	2 768 066	2 941 070	2 970 481	3 000 186	3 030 188
Average trip spend	R6 440	R6 536	R6 634	R6 734	R6 835
Total direct expenditure (billions)	R0.79	R1.11	R1.43	R1.87	R2.10
<b>High Road Scenario</b>					
Number of tourists	123 093	200 026	261 573	307 732	414 015
% growth	83.7%	62.5%	30.8%	17.6%	34.5%
% of pre-COVID average	40%	65%	85%	100%	N/A
% share of total tourists to eThekwi	4%	5%	7%	8%	10%
Domestic tourists	2 941 070	3 460 083	3 546 585	3 635 250	3 726 131
Average trip spend	R6 440	R6 536	R6 634	R6 734	R6 835
Total direct expenditure (billions)	R0.79	R1.31	R1.74	R2.07	R2.83

# Product Experience vs target market matching

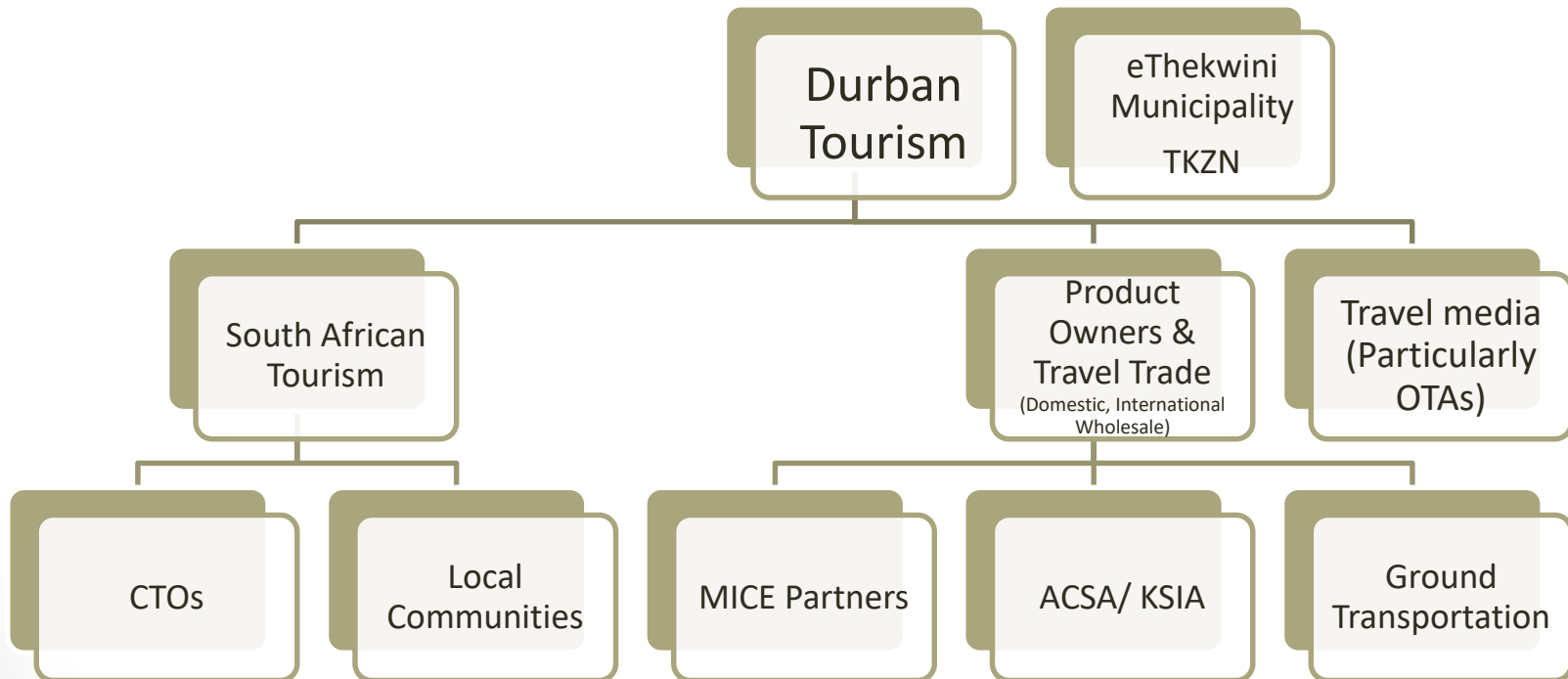
Products & Attractions	Target Audience		
Prioritisation	Priority 1 Affluent trendsetters	Priority 2 Active Buzz Seekers	Priority 3 Relaxed Sight seekers and relaxed explorers
Accommodation	Shared to 5*	Shared to 3*	3-5*
Mode of transport	Air & Road	Air & Road	Air
Entertainment	✓✓	✓✓✓	✓✓✓
Adventure	✓✓	✓✓✓ (Extreme)	✓✓ (Soft adventure)
Nightlife	✓✓	✓✓✓	✓
Shopping and lifestyle	✓✓✓	✓✓	✓
Education & New Experiences	✓✓✓	✓✓✓	✓✓
Religious and pilgrims	N/A	N/A	✓✓✓
Sports and recreation	✓✓	✓✓✓	✓
Nature, Culture and Heritage	✓✓	✓	✓✓✓
Gastronomy	✓	✓✓✓	✓✓✓
Arts, culture & heritage	✓✓	✓✓✓	✓✓
Honeymoon & Weddings	✓✓✓	✓✓✓	N/A
Pleasurable sights, hiking and walking tours	✓✓✓	✓✓✓	✓✓✓
Township Tourism	✓	✓✓✓	✓
Film Tourism	✓✓✓	✓✓✓	✓✓
Beach Tourism	✓✓✓	✓✓✓	✓✓✓
Business Events	✓✓✓	✓✓✓	✓✓✓

**Legend:** 1. High demand = ✓✓✓      2. Medium demand = ✓✓  
 3. Low demand = ✓      4. N/A = No demand

# APPLICATION OF TRADITIONAL AND NEW MEDIA

Markets	Durban & KZN	Rest of South Africa	Rest of Africa & Middle East Core Markets	Non-African core markets
Intent	Drive & inspire ambassadorship among stakeholders and citizenry by encouraging them to live the brand	Drive “Experience Durban” campaigns and market-centric programmes	Stimulate demand “Experience Durban”, Africa’s Playground & positivity and value-for-money	Drive positivity, stimulate demand using “Experience Durban” campaign to affirm Durban’s destination brand positioning as “Africa’s Playground”
Audiences	Youth, buzz seekers affluent trendsetters, relaxed sight seekers and relaxed explorers	Youth, buzz seekers and affluent trendsetters, relaxed explorers	Youth travellers, buzz seekers, affluent trendsetters, curious explorers, and relaxed sight seekers	Affluent trendsetters’ curious explorers and relaxed sight seekers
Message	Focused on affordability “Experience Durban” vibrancy day trips, staycations, short breaks, weekend -away, excursions, VFR, sports, entertainment and nightlife, and MICE, Youth Travellers and affluent trendsetters	Value for money and competitive and comparative strengths, vibrancy short breaks, weekend -away, VFR, entertainment and nightlife, MICE, Youth Travellers and affluent trendsetters	Value for money, distinctiveness, and exclusive experiences	Value for money, wellbeing, nature, connectedness, and bucket list experiences
Media	Online, social media, Local, Provincial Broadcast and Bespoke Outdoor/Activations	Broadcast and online in Gauteng and Western Cape with national reach. Travel Trade (Wholesale, Retail OTA), FMCG, Financial Services and unconventional partnerships	Targeted online (social media), in market media, airline and Travel Trade (Wholesale, Retail and OTA) and unconventional partnerships	Targeted online media (social media), in market media, airline and Travel Trade (Wholesale, Retail and tech companies)

## IMPLEMENTING PARTNERSHIP MODEL – LEAD & SUPPORTING PARTNERS





# Implementation & Time Frames

2022 -2023

Human resources development

Enforcement of Covid-19 Protocol

Launch annual consumer insights study

Put in place integrated marketing and communications plan

Intentional MICE Business Development Drive

Institute intentional digital transformation & innovation programme

Product & experience modification

2023 - 2024

Product & experience modification

Refined pricing and package models with private sector

Reviewed and improve global distribution channels /network

Design and launch Infrastructure improvement advocacy and partnership programmes

Refine and Improve air access policies and practices to strengthen Durban Direct programmes

2024 – 2026

Product & experience modification

Refined pricing and package models with private sector

Reviewed and improve global distribution channels /network

Design and launch Infrastructure improvement advocacy and partnership programmes

Refine and Improve air access policies and practices to strengthen Durban Direct programmes

Implementation Risk

Lack of political will and progressive policy.

Under funding of marketing programmes and activities

Lack of robust brand guardianship and custodianship.

Non-adherence to monitoring, evaluation and control principles.

Inadequate internal capacity

# Monitoring & Evaluation

#	Key Performance Areas	Annual Performance Indicators
1	<b>Annual tourism arrivals, overnight stay and spend as projected in the Visitor Marketing Strategy</b>	<ul style="list-style-type: none"> <li>• Domestic - Percentage increase in day trips, intra-provincial overnight arrivals and direct spend as set out in this VMS.</li> <li>• International - Percentage increase in, African overnight arrivals and direct spend as set out in this VMS.</li> <li>• Percentage increase in non-African overnight arrivals, length of stay and direct spend as set out in this VMS.</li> <li>• Total tourism contribution to GDP as projected in this VMS.</li> </ul>
2	<b>Brand Awareness and positivity levels</b>	<ul style="list-style-type: none"> <li>• Total unique visitors to Durban Tourism's website as measured by Google Analytics.</li> <li>• Improved brand awareness based on brand tracking, research and annual consumer insights.</li> <li>• Return on Investment and customer engagement on activities.</li> <li>• Total number of blended local, domestic and international campaigns run.</li> </ul>
3	<b>Market penetration and development</b>	<ul style="list-style-type: none"> <li>• Total number of certified eThekweni Market Development Specialists in key markets and regions.</li> <li>• Total number of marketing partnership agreements signed for digital technology and non-industry partners in core markets</li> <li>• Total number of feeder markets travel trade trained and ambassadors recruited</li> </ul>
4	<b>Job Creation</b>	<ul style="list-style-type: none"> <li>• Total employment sustained or created.</li> </ul>

# Conclusion

“We live in a world of constant change; a world that continually moves and progresses to higher levels of comfort and well-being. The latest scientific technology has led to the development of a new airplane engine that will enable us to travel in a commercial airplane at 25,000 miles per hour. Within the next ten years, it will be possible to travel anywhere in the world in less than an hour. These changes will challenge the way we market tourism in the next millennium.” *David L. Egell, Sr. : Professor and Director, Center for Tourism, East Carolina University in Greenville*