



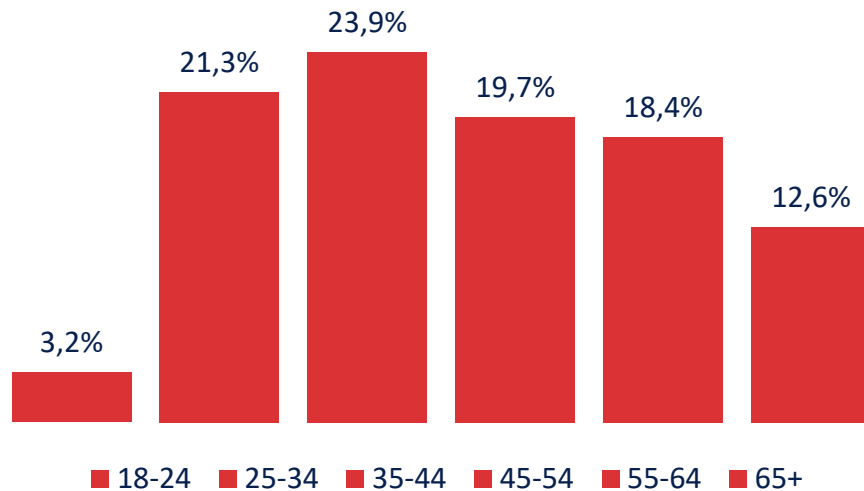
DIPSTICK ON CHANGES IN CONSUMER PREFERENCE

Changes in consumer preference post Covid 19.

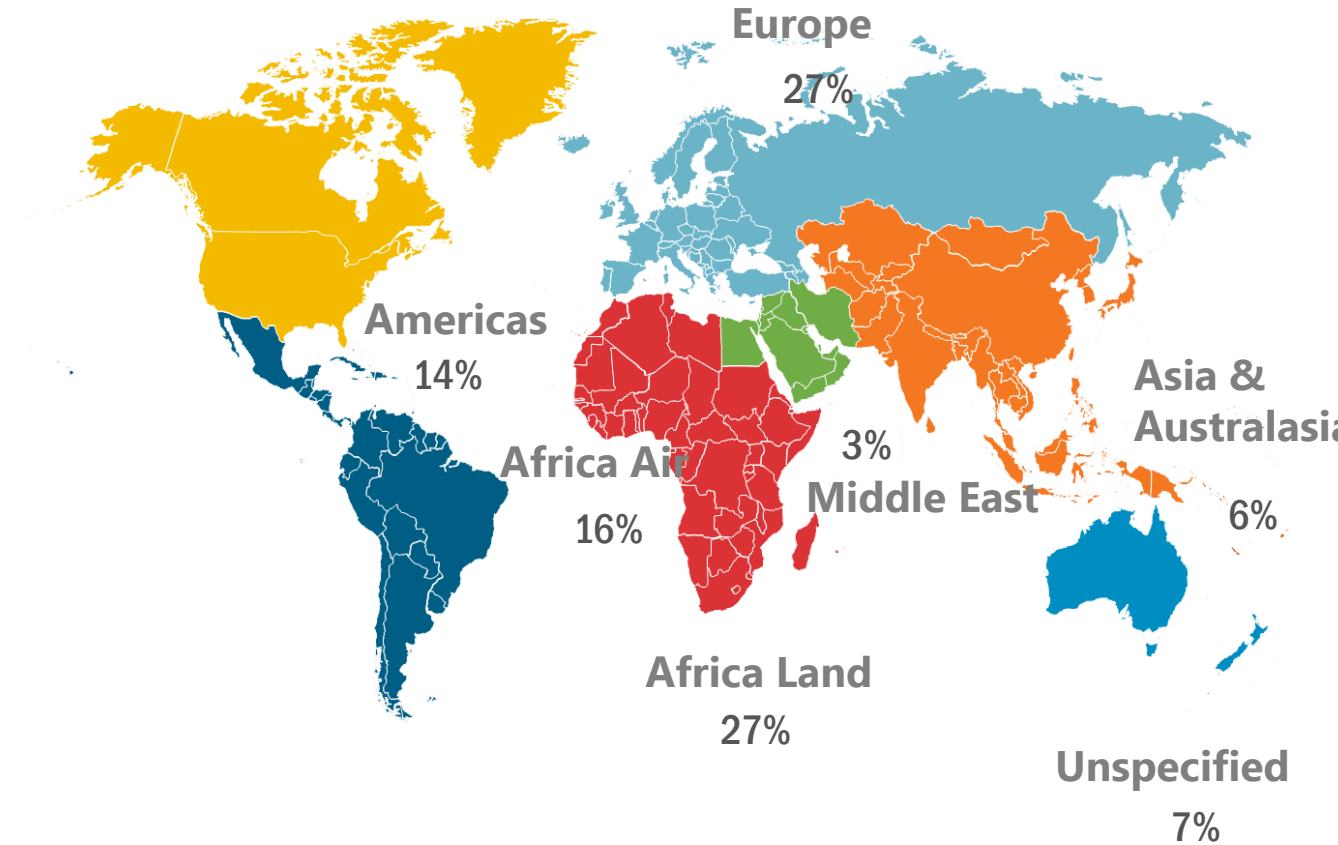
Understanding consumer travel preferences post Covid 19 for Destination Marketing Organization is a must in order to service the consumers in the manner they expect. The report contains some of the themes from the **DIPSTICK** online non probability convenience sampling survey conducted by SA Tourism Analytics and Insight team on international tourist. The focus of this exploratory study was to solicit views of international tourist who have visited SA in the past 5 years. SA Tourism intends to do a more detailed study later in the year.

Sample International Tourist

Sample by Age



Sample by Region



Note: Online survey. Non-probability convenience sampling. Travellers who have visited SA in the past 3 years. Other represents South Africans residing in another country.

UNDERSTANDING INTERNATIONAL TOURIST NEEDS DURING



The plight of the COVID 19 Pandemic, changed how people interact with one another, and also how they will travel in future. Many experts suggest that the phenomenon of social distancing is likely to be a “new normal”

COVID has affected travel, with various borders closed to curb the spread of the pandemic. The increasing number of people being infected created anxiety and fear on how people interact with one another, and how they interact with goods and services

Despite the restrictions, consumers are itching to be outside and interact with the world. A study by KANTAR stated that consumers are in reminiscing about past travel and dreaming future travel. Consumers would like to travel again but not without the assurance that it is safe to do so

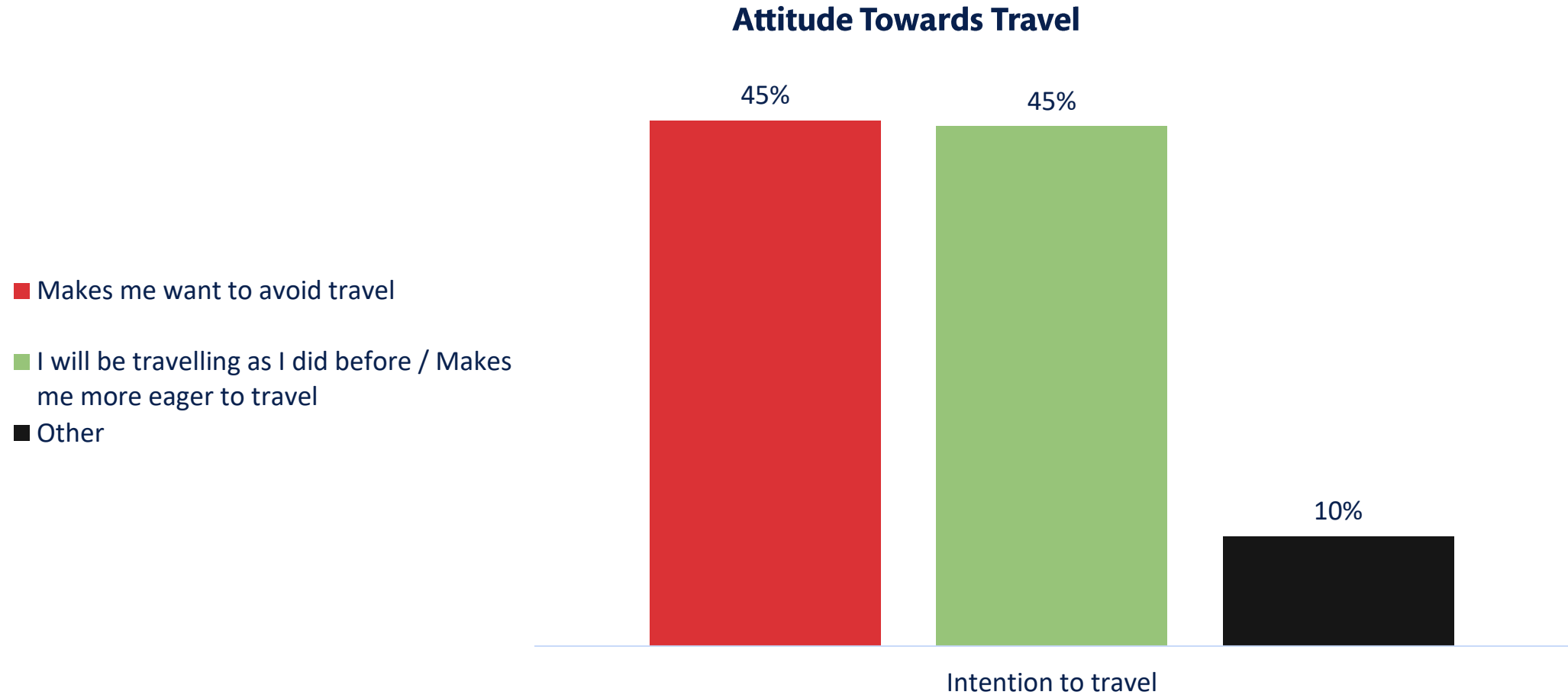
MAIN FINDINGS:

Not surprisingly International destinations are the preferred choice among seasoned international travelers. The majority of tourists wanting to visit international and regional destinations also being among those with a positive attitude towards travel in this moment while preference for domestic travel is predominantly among those seeking to avoid travel. Close to two-thirds seeking to travel immediately or within the year.

Millennials will be the first tourists to travel with a greater eagerness to travel and a perceived lower vulnerability for COVID, these consumer are less risk averse despite the global pandemic and remain intent on travel and are looking to travel within 2020.

PROPENSITY TO TRAVEL

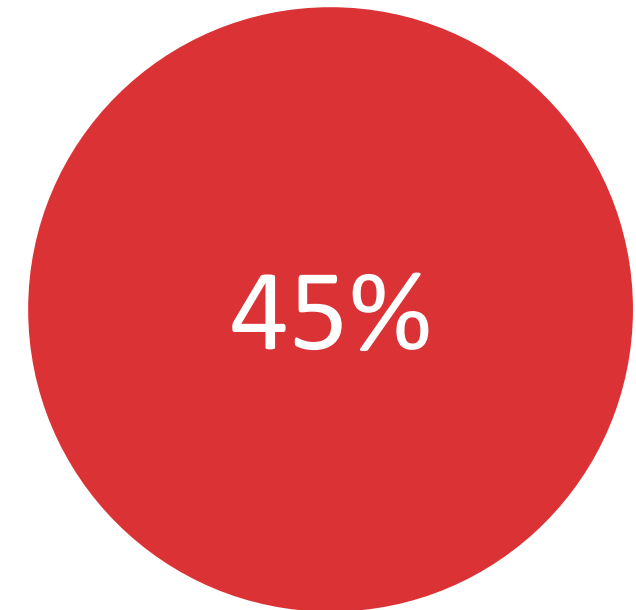
45% of the international tourists claim that they will avoid travel whilst another 45% has an inclination to either travel as they did in the past or travel more. It was only 10% that are on the fence and indecisive about their travel prospects.



THE CAUTIOUS APPROACH – Makes me want to avoid international travel

45% of tourists claim they will avoid travel. They rather travel in their own country until it is safe enough to cross the borders. Places with less tourists will be considered.

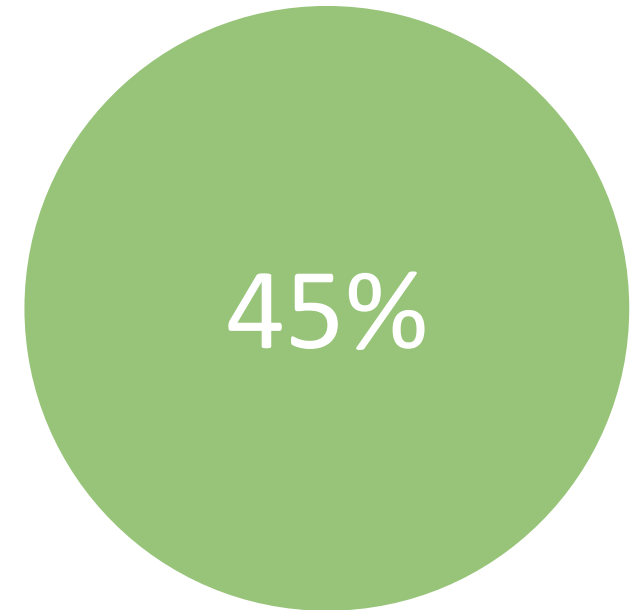
- I will travel in my own country
- Will be travelling locally until it's safe to go across borders
- Avoiding travel for now and will probably look at travelling to areas with less tourists
- For now I want to avoid international travel and travel in my home country or close countries. However, I want to continue to internationally travel soon
- Uncertain for foreign travel due to lack of trust in travel insurance coverage
- I will travel after the pandemic is over



THE EAGER TRAVELERS – I will be travelling as I did before & Im more eager to travel

45% will travel as they normally did with a substantial (20%) portion claiming this pandemic has made them to be more eager to travel . They are ready for the respective government to lift all the travel restrictions so they can travel. They are weary though of the potential price hikes and affordability of travel.

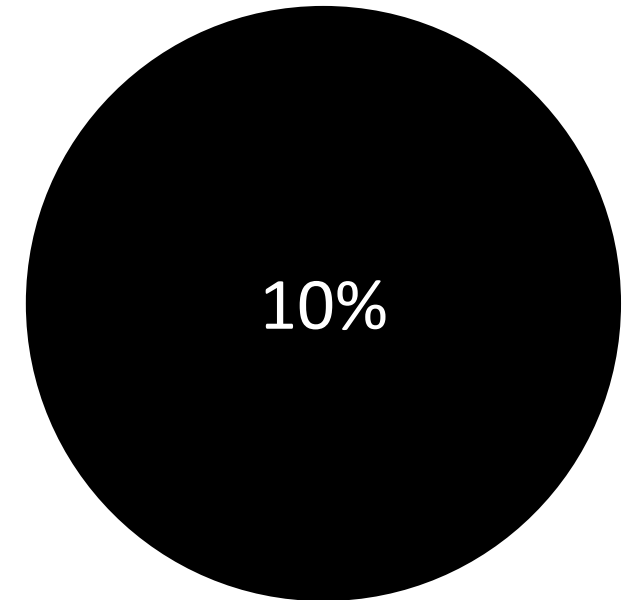
- I will need to travel for work and leisure, but restrictions may make this difficult
- I still will be traveling, but realize that extra precautions will be necessary
- Waiting for things to open internationally
- Will continue to travel if price of air tickets still affordable and if no hike in prices. The SA Tourism Brand Tracker Study shows that affordability of ticket pricing is the second biggest barrier to travel to South Africa. Applying the social distancing in aircraft wont be a viable solution if they will pass those cost to the consumer.



THE INDECISIVE ONES

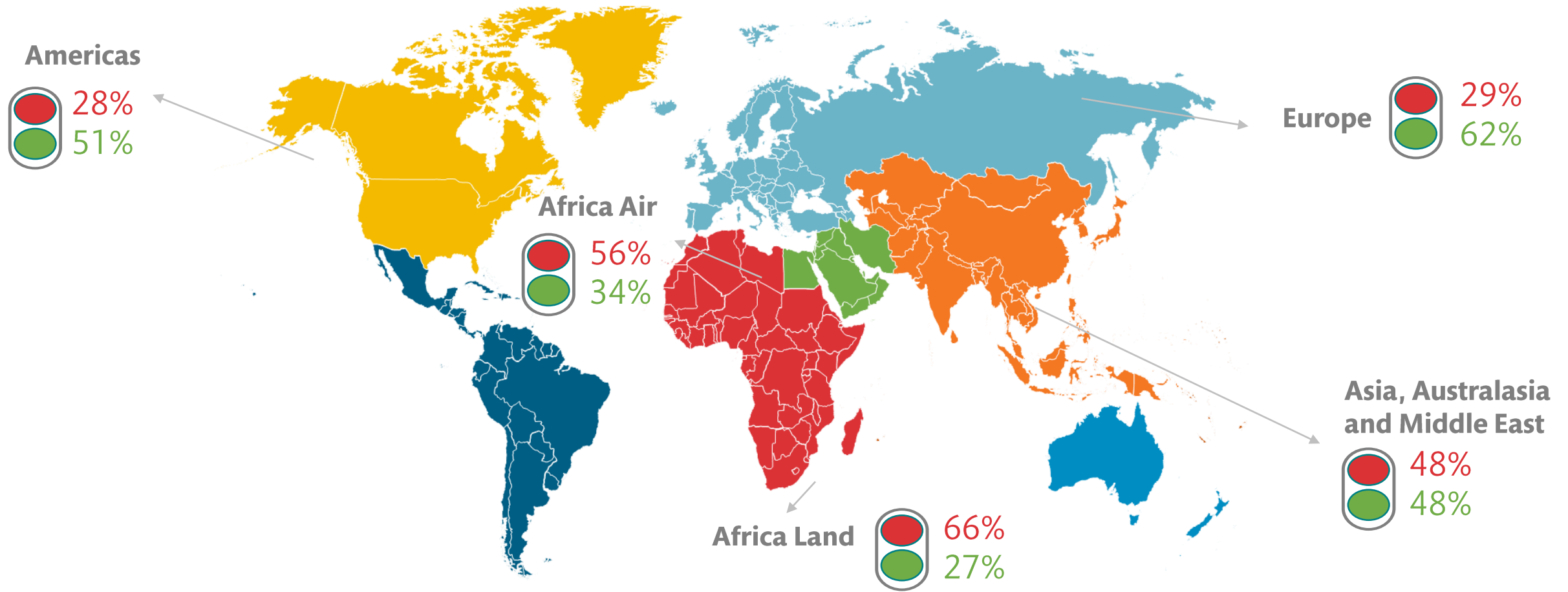
10% of the international tourists are still on the fence when it comes to travel. These are travellers who normally budget longer for their international trips and they are still paranoid and fear of buying ravel and end up losing a substantial share of their hard earned money because.

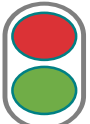
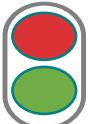
- It makes travel more difficult, because airlines cut down on their flights and some countries restrict entry
- It makes me sad as we had to cancel our planned trip to Europe
- I don't travel very often in the first place
- I'll travel again from next year



PROPENSITY TO TRAVEL

The eagerness to travel is driven by the Americas and Europe. Africa Air and Land markets have the highest “avoid travel” scores compared to the other regions.



 Avoid
 "Eager" and "no effect"

Global Travel Behaviour Survey (May 2020)

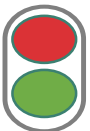
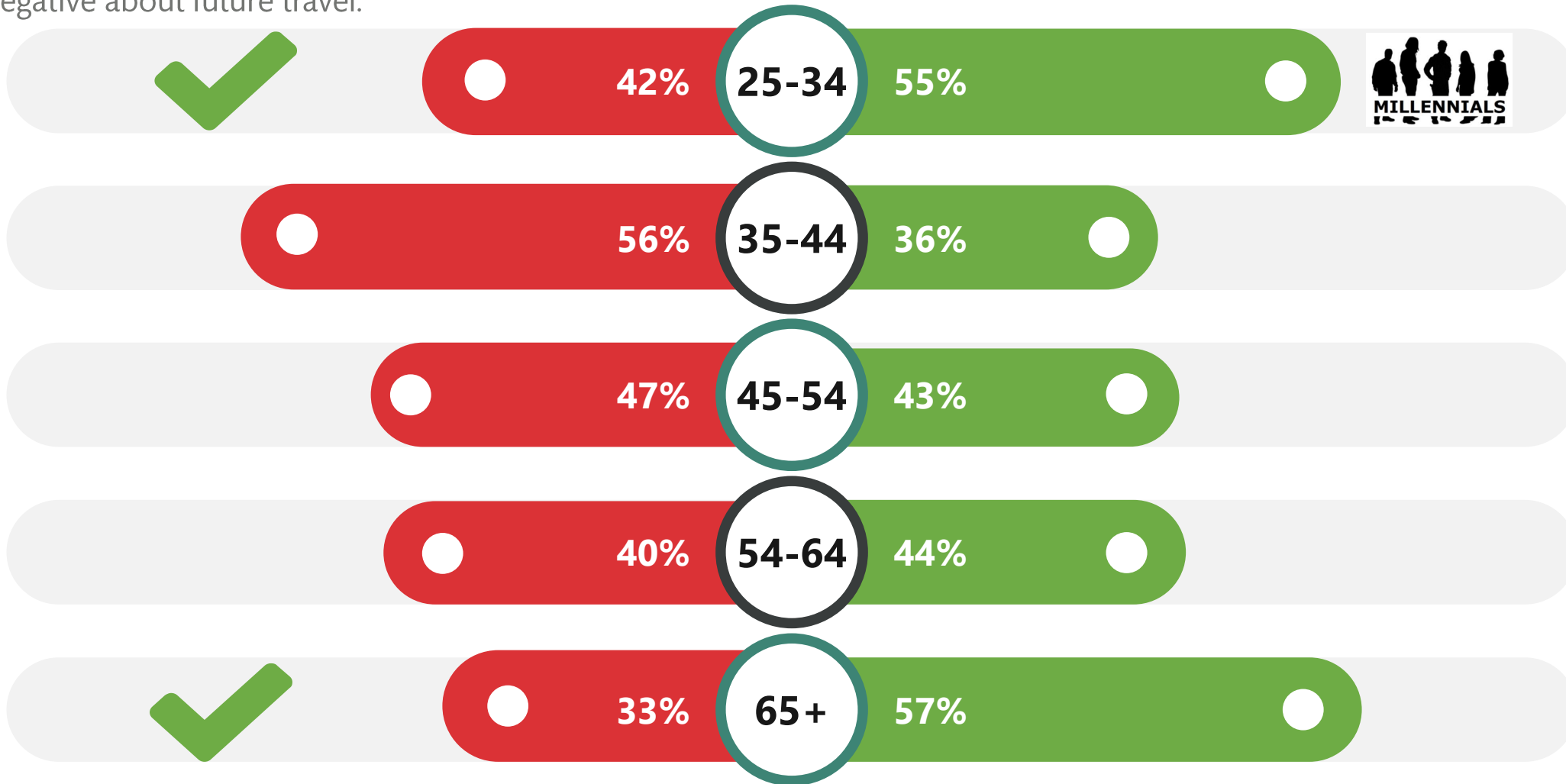
How has the COVID 19 pandemic affected your attitude towards travel? Score will not add to 100% as there is another category.



SOUTH AFRICAN TOURISM

PROPENSITY TO TRAVEL – BY AGE

“Millennials” aged between 25-34 and tourists 65+ are most likely to express positive travel intentions. Age group 35-54 are the most negative about future travel.



Avoid
“Eager” and “no effect”

Global Travel Behaviour Survey (May 2020)

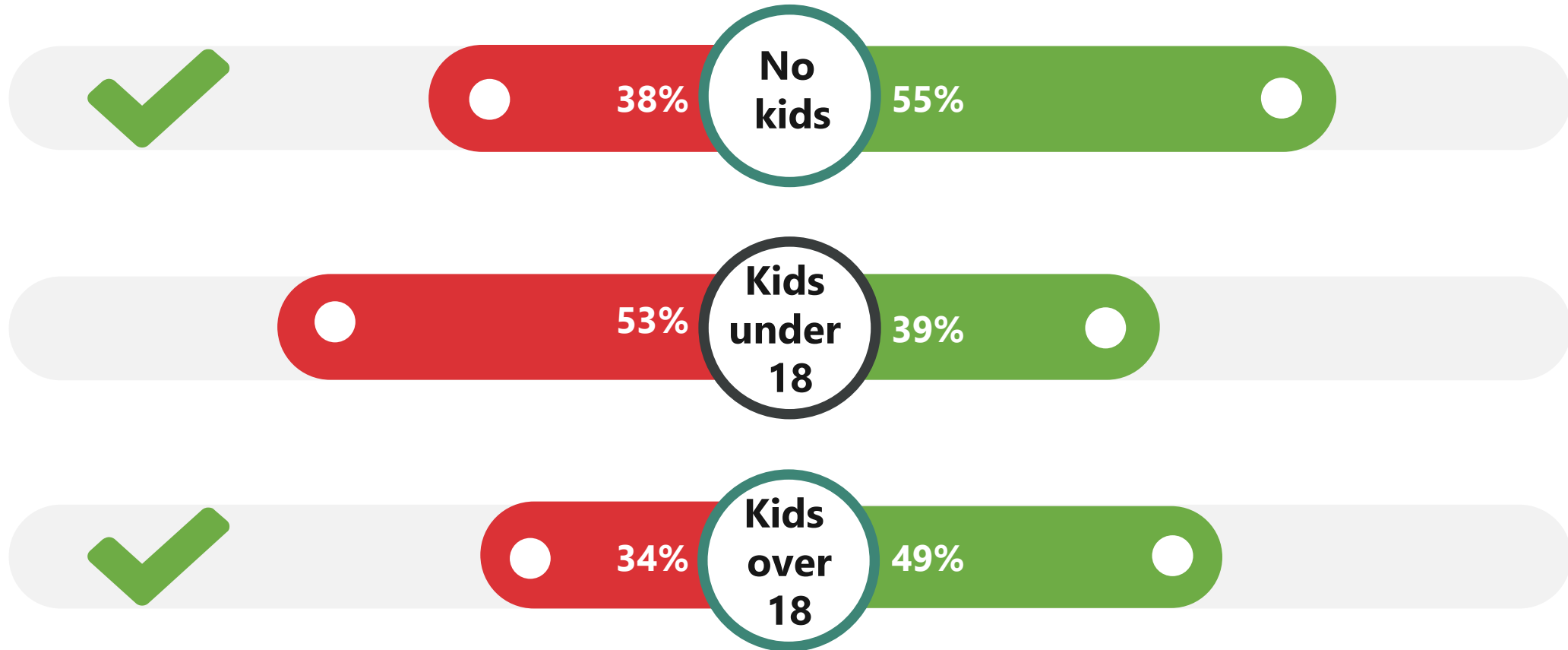
How has the COVID 19 pandemic affected your attitude towards travel? Score will not add to 100% as there is another category.



SOUTH AFRICAN TOURISM

PROPENSITY TO TRAVEL - LIFE STAGE

Parents of young children are most likely to avoid travel. Parents of adult children however are more inclined to express positive travel intentions and travellers with no children most inclined to travel



Avoid
"Eager" and "no effect"

Global Travel Behaviour Survey (May 2020)



SOUTH AFRICAN TOURISM

How has the COVID 19 pandemic affected your attitude towards travel? Score will not add to 100% as there is another category.

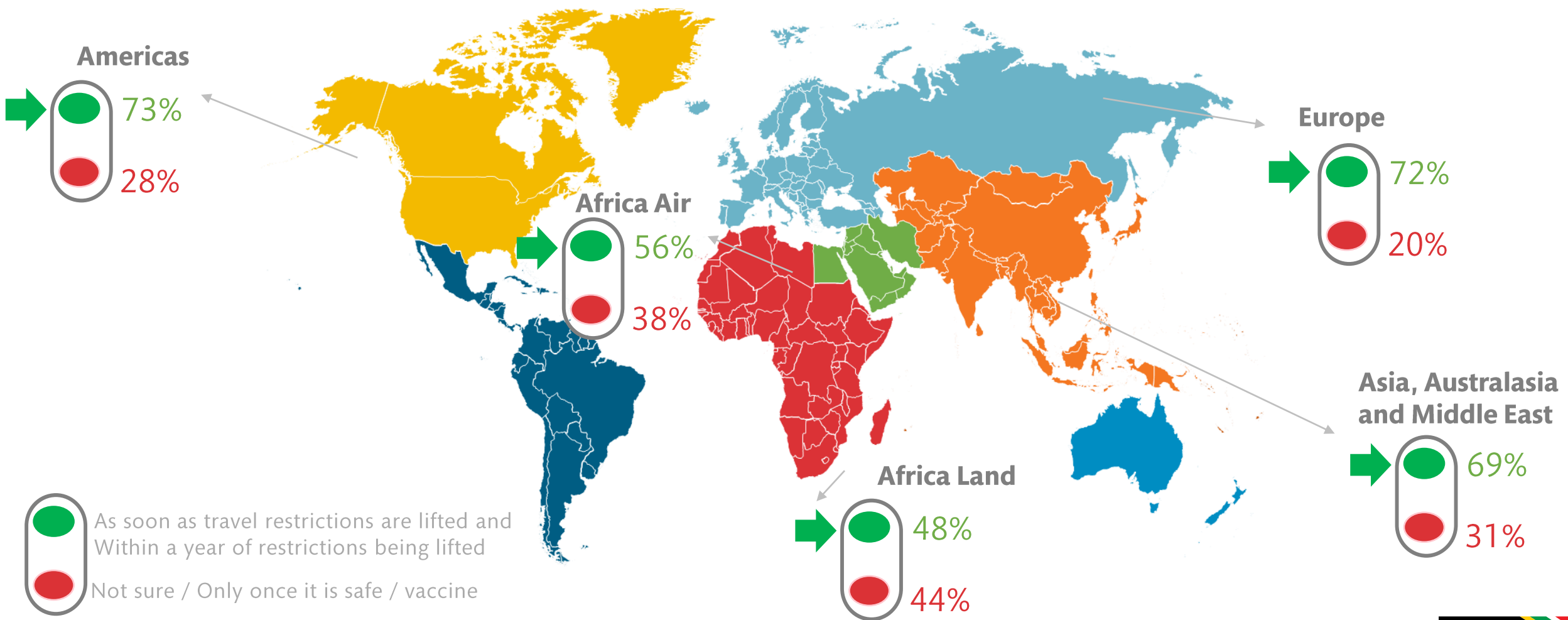
HOW SOON WILL YOU CONSIDER TRAVELLING?



62% say they will travel as soon as restrictions are lifted or in the next year after restrictions are lifted. Almost 1/3 of respondents are not sure when they will travel and will only travel once they are confident that it is safe to do so.



HOW SOON WILL YOU CONSIDER TRAVELLING?

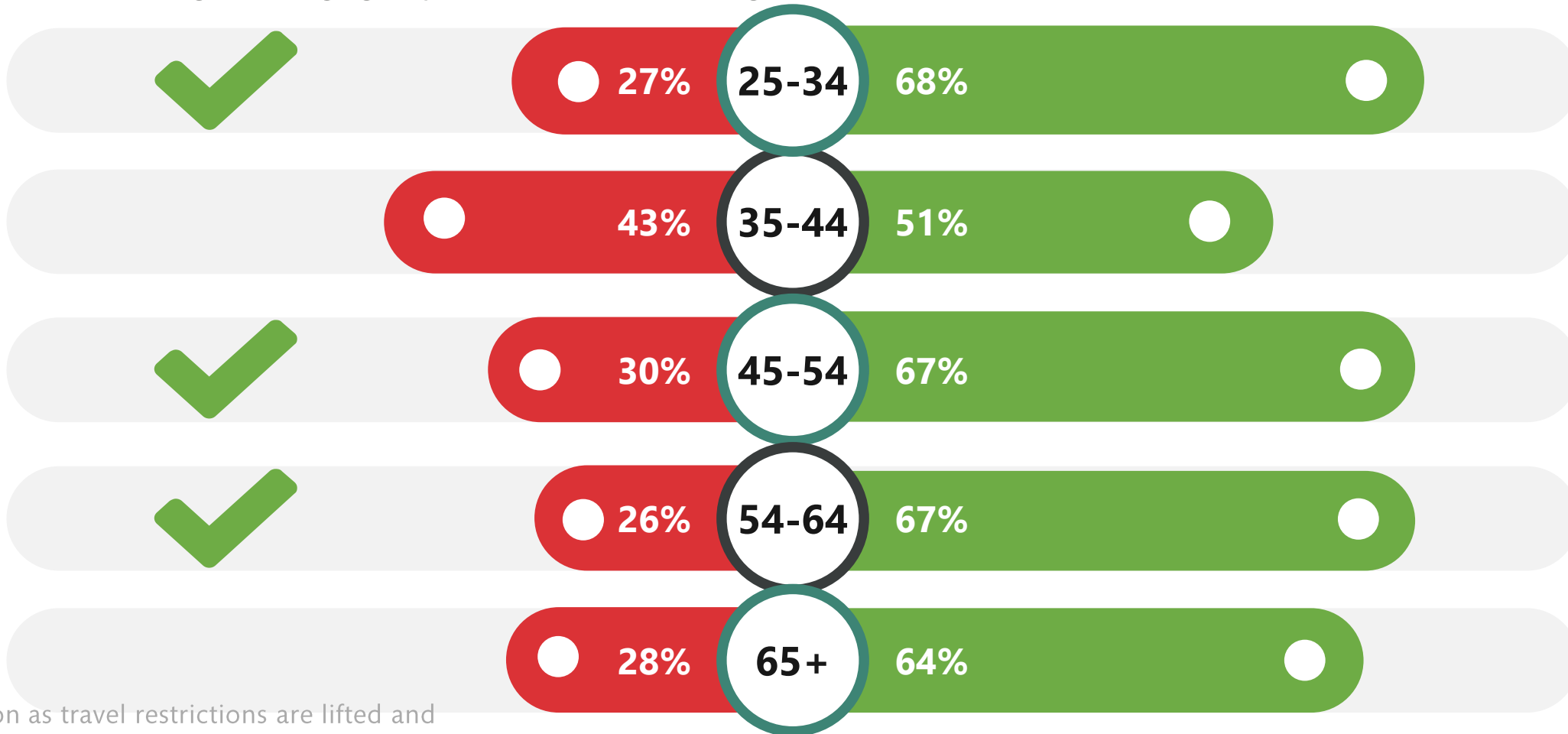
The majority of international travellers are ready to travel with 1 year if travel restrictions being lifted. International travellers in the Americas and Europe have the greatest interest in travel within a year while African international travellers are more likely to defer travel until it is safe or vaccine is found





 As soon as travel restrictions are lifted and Within a year of restrictions being lifted
 Not sure / Only once it is safe / vaccine

HOW SOON WILL YOU CONSIDER TRAVELLING? - BY AGE

“Millennials” aged between 25-34 and tourists 45 to 64 are most likely to express positive travel intentions within a year of restrictions to travel being lifted. Age group 35-54 are the most negative about future travel



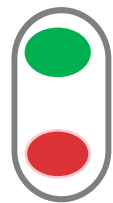
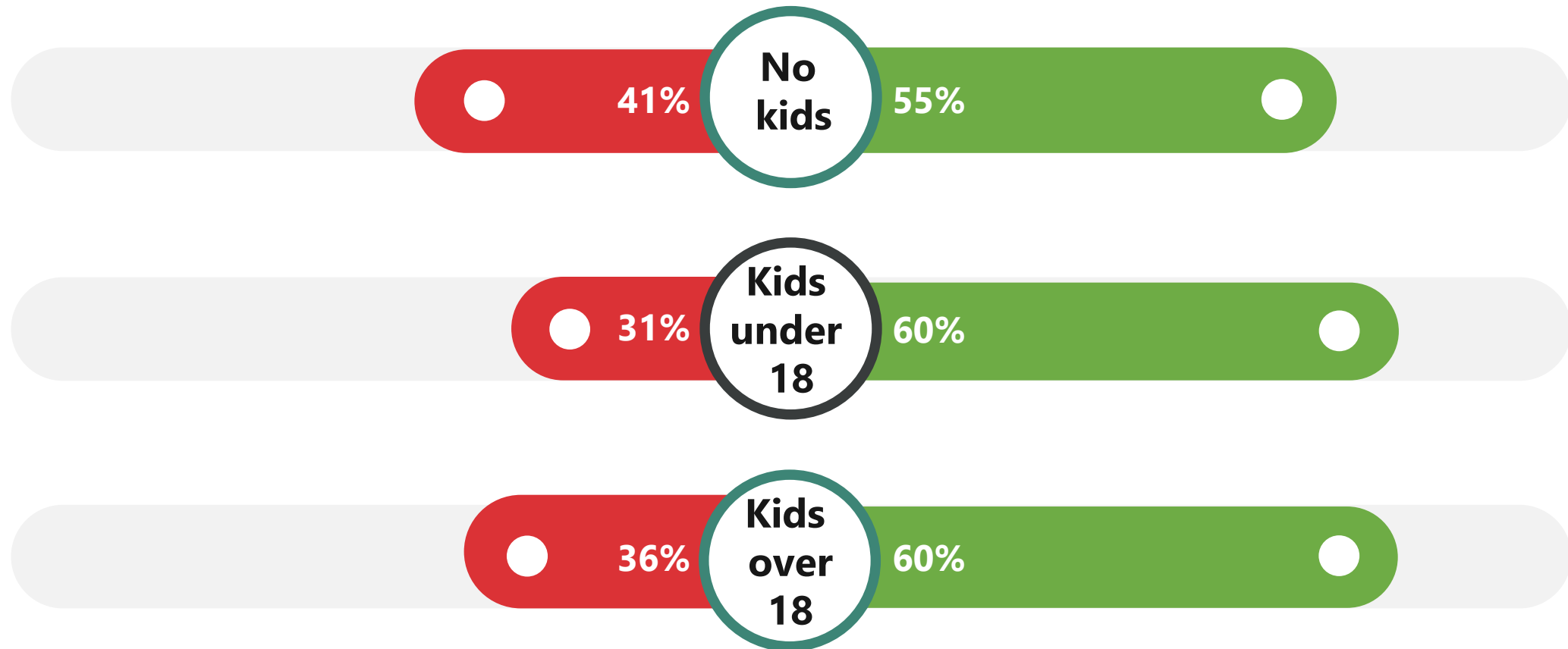
 As soon as travel restrictions are lifted and Within a year of restrictions being lifted

 Not sure / Only once it is safe / vaccine

How soon after the COVID-19 travel restrictions are lifted will you consider travelling?

HOW SOON WILL YOU CONSIDER TRAVELLING? - LIFE STAGE

Despite parents seeing the greatest desire to avoid travel they lead on their intention to travel within a year of travel being opened up



As soon as travel restrictions are lifted and
Within a year of restrictions being lifted

Not sure / Only once it is safe / vaccine

UNDERSTANDING INTERNATIONAL TRAVELLER NEEDS DURING

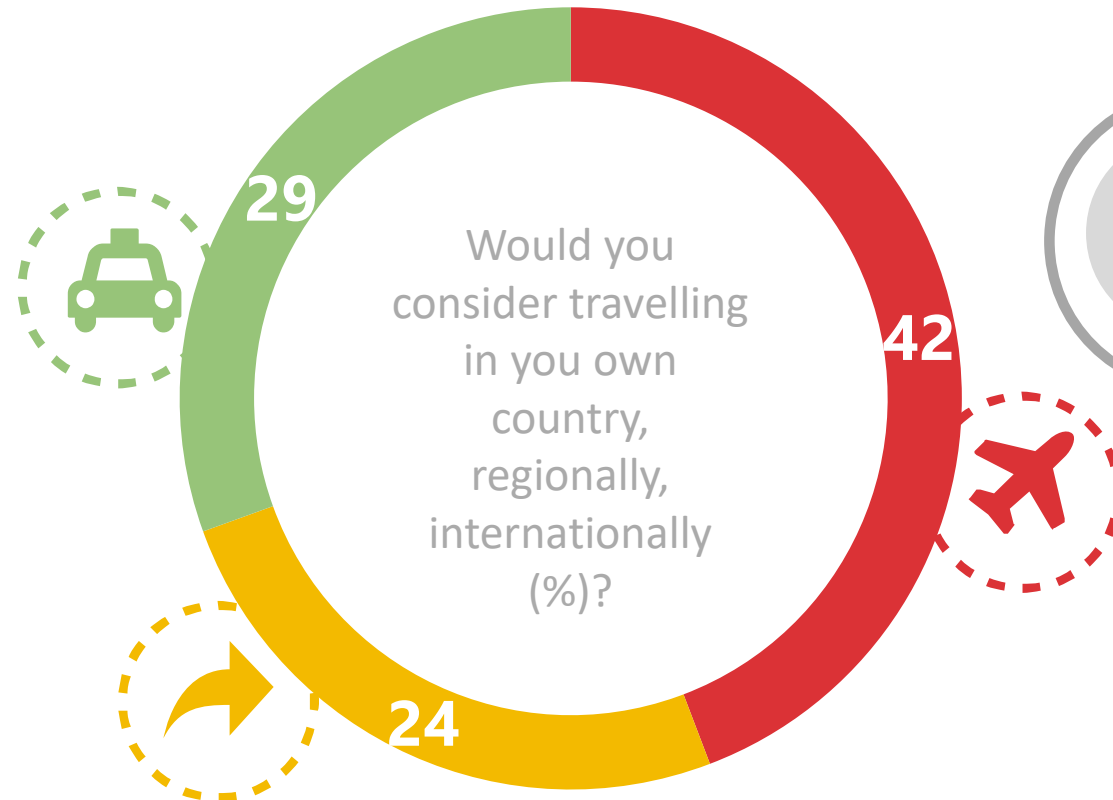


WHERE WILL YOU TRAVEL ON YOUR FIRST TRIP?

95% of all respondents are keen on travelling in the future. 42% would take their first trip overseas. 29% will travel domestically first and 24% will travel regionally. The skew to international travel is driven by the sample which was designed to represent international travellers only.



Respondents who avoid travel will be more likely to travel domestically



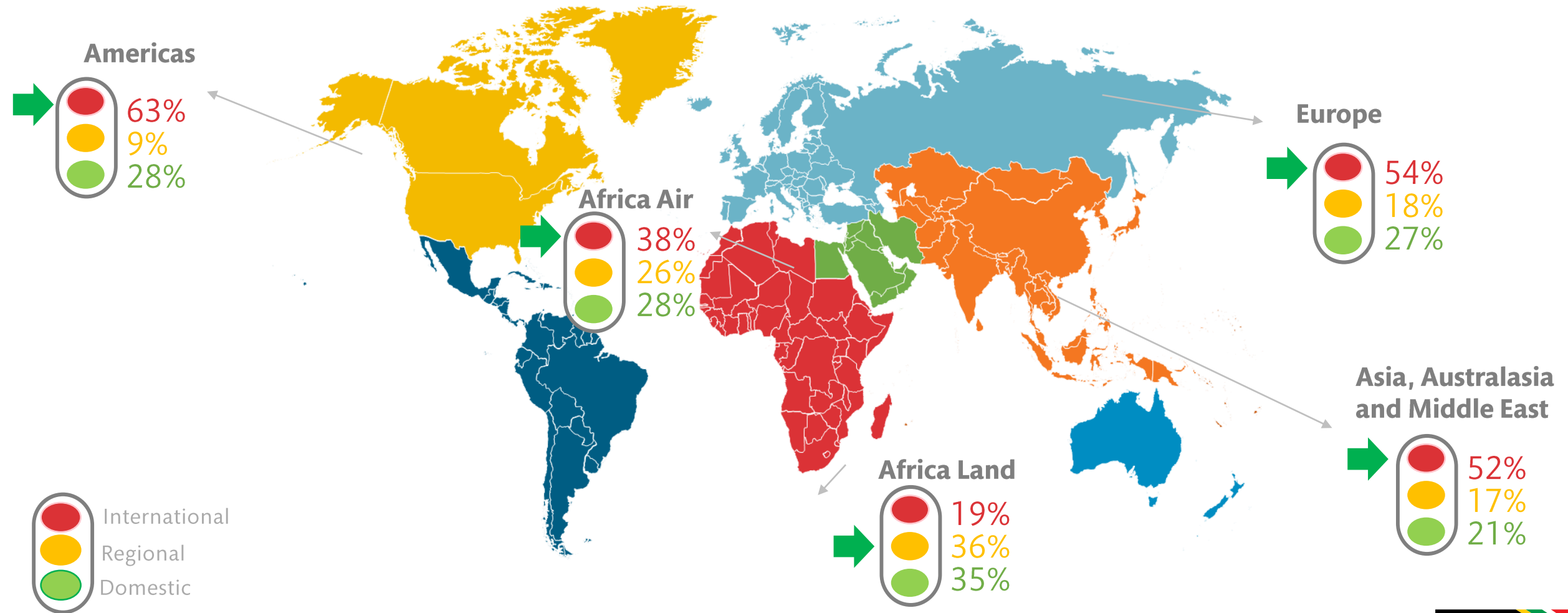

Respondents who are more willing to travel will travel internationally then regionally

■ Internationally
 ■ Regionally
 ■ Domestically

Would you consider travelling within your own country or to regional neighboring countries or internationally on your first trip?

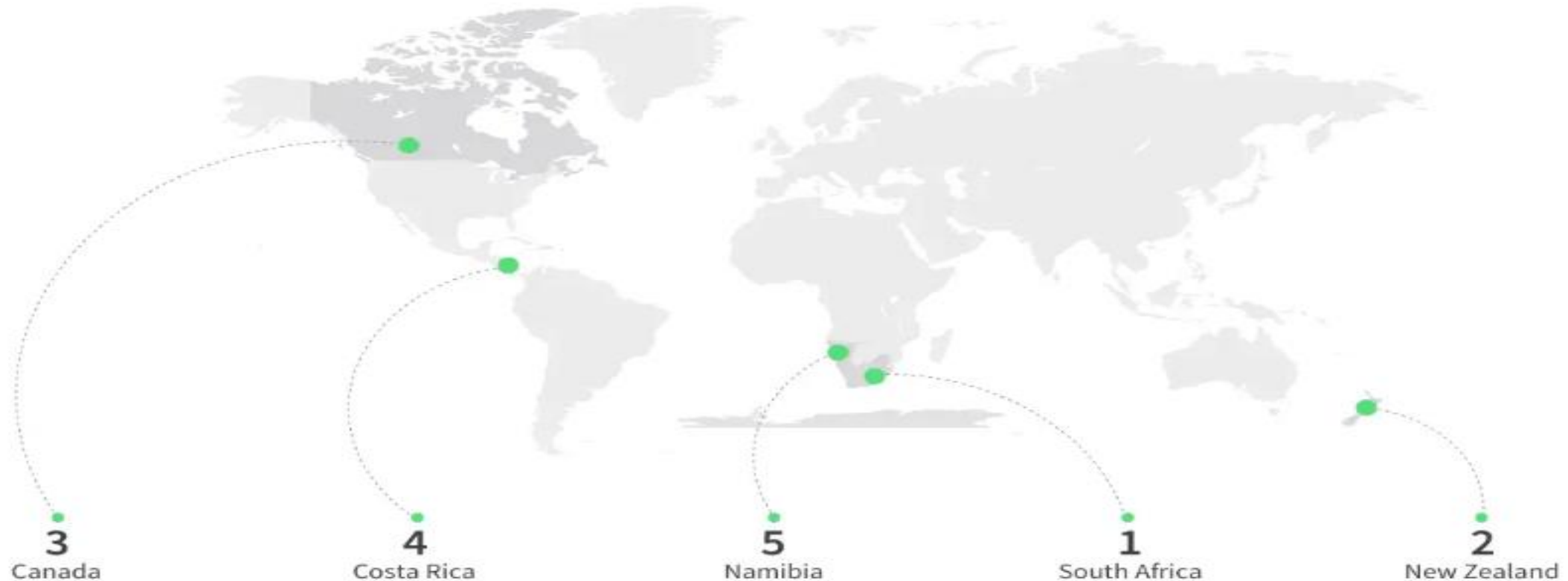
WHERE WILL YOU TRAVEL ON YOUR FIRST TRIP?

The majority of international travellers are ready to travel to international destinations and this is driven by air markets led by Americas and followed by Europe, Asia and to a lesser extent Africa Air. Africa Land are most likely to travel regionally and domestically



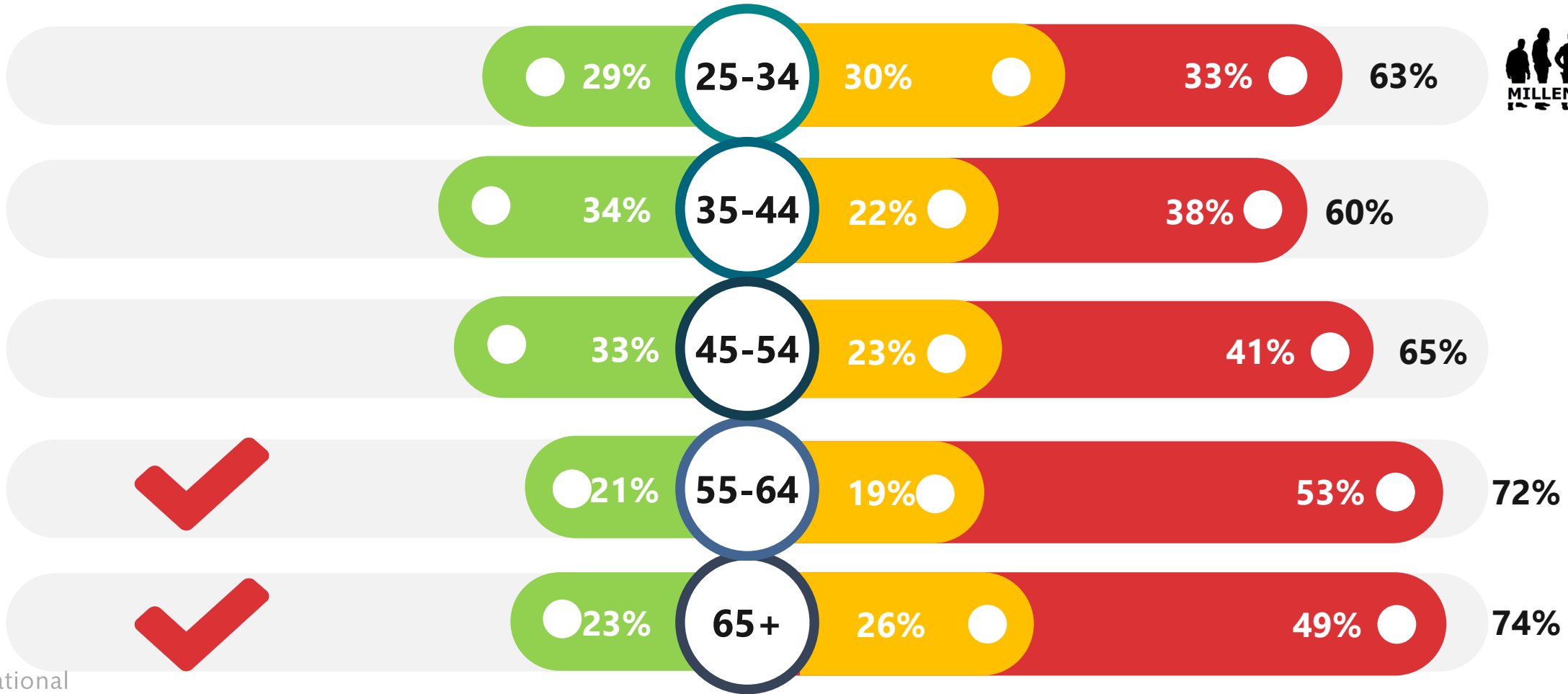
Tourlane an online travel website found South Africa was the **#1 preferred post COVID destination** among their readers

Which destination would be the perfect post-Corona escape?



WHERE WILL YOU TRAVEL ON YOUR FIRST TRIP? - BY AGE

Travelers aged 55 or older are most likely to express a greater preference for international destinations while younger have a greater preference for domestic destinations



- International
- Regional
- Domestic

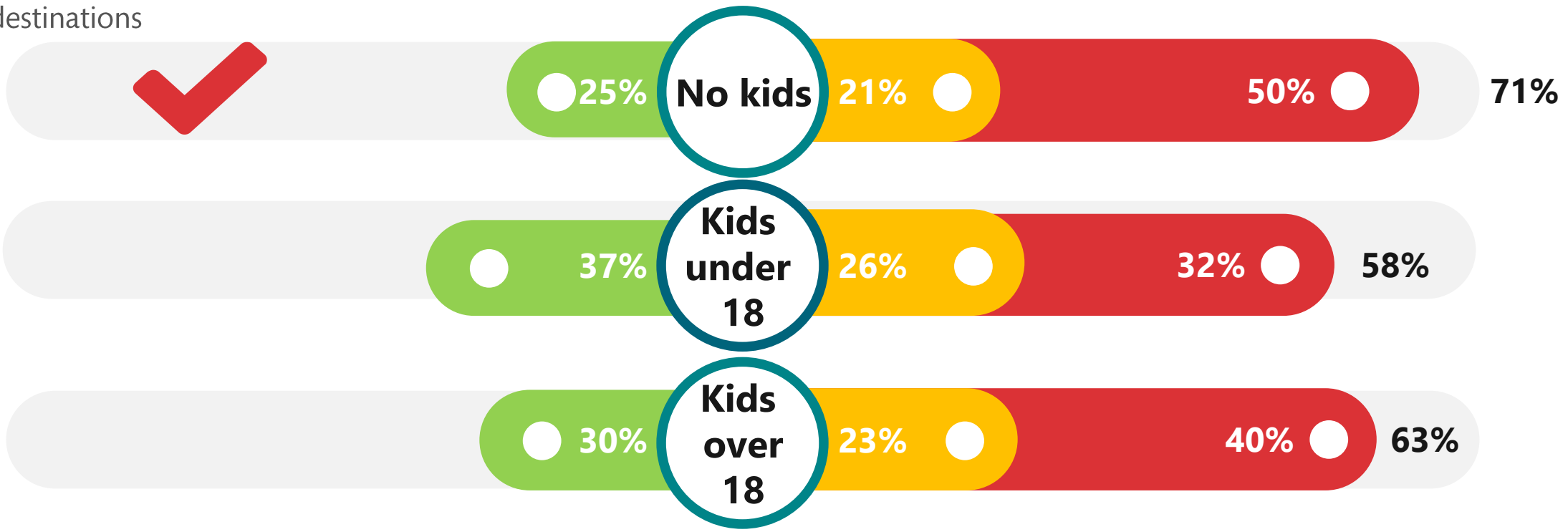
Global Travel Behaviour Survey (May 2020)

Would you consider travelling within your own country or to regional neighboring countries or internationally on your first trip?



WHERE WILL YOU TRAVEL ON YOUR FIRST TRIP? - LIFE STAGE

Travelers without children are most likely to travel to international destinations while parents are most likely to prefer domestic destinations



- International
- Regional
- Domestic

Would you consider travelling within your own country or to regional neighboring countries or internationally on your first trip?

UNDERSTANDING INTERNATIONAL TRAVELLER NEEDS DURING COVID 19



PROPENSITY TO TRAVEL
HOW SOON WILL THEY
START TRAVELLING

1

WHERE THEY WILL
TRAVEL TO - FIRST TRIP?

2

PURPOSE OF TRAVEL,
EXPERIENCES AND
ACTIVITIES

3

WHAT IS THEIR CHOICE
OF ACCOMMODATION
- FIRST TRIP

4

CHOICE OF TRAVEL
COMPANION - FIRST
TRIP

5

WHAT PRECAUTIONS WILL BE
TAKEN WHEN TRAVELLING?

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REASON FOR WANTING TO
VISIT SA

7

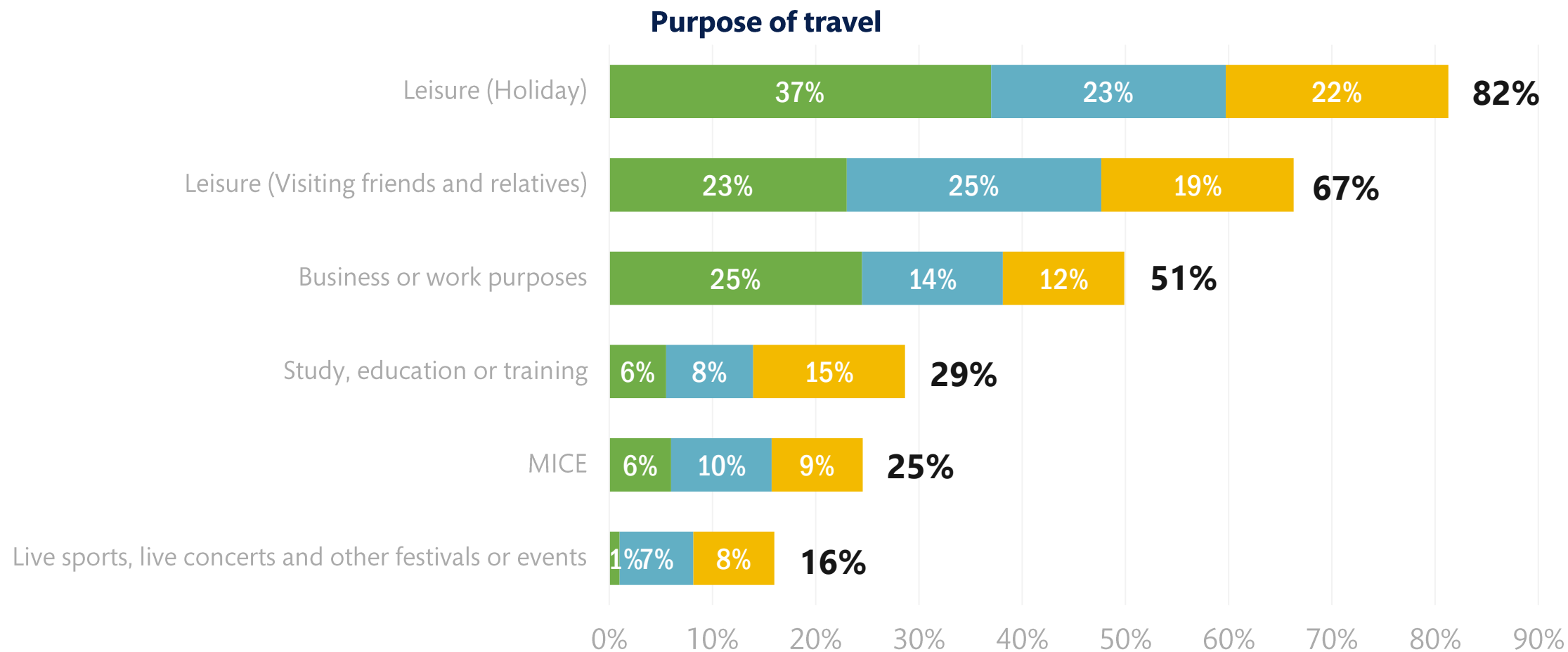
THE CASE FOR MILLENNIALS?

8



PURPOSE OF YOUR FIRST TRIP

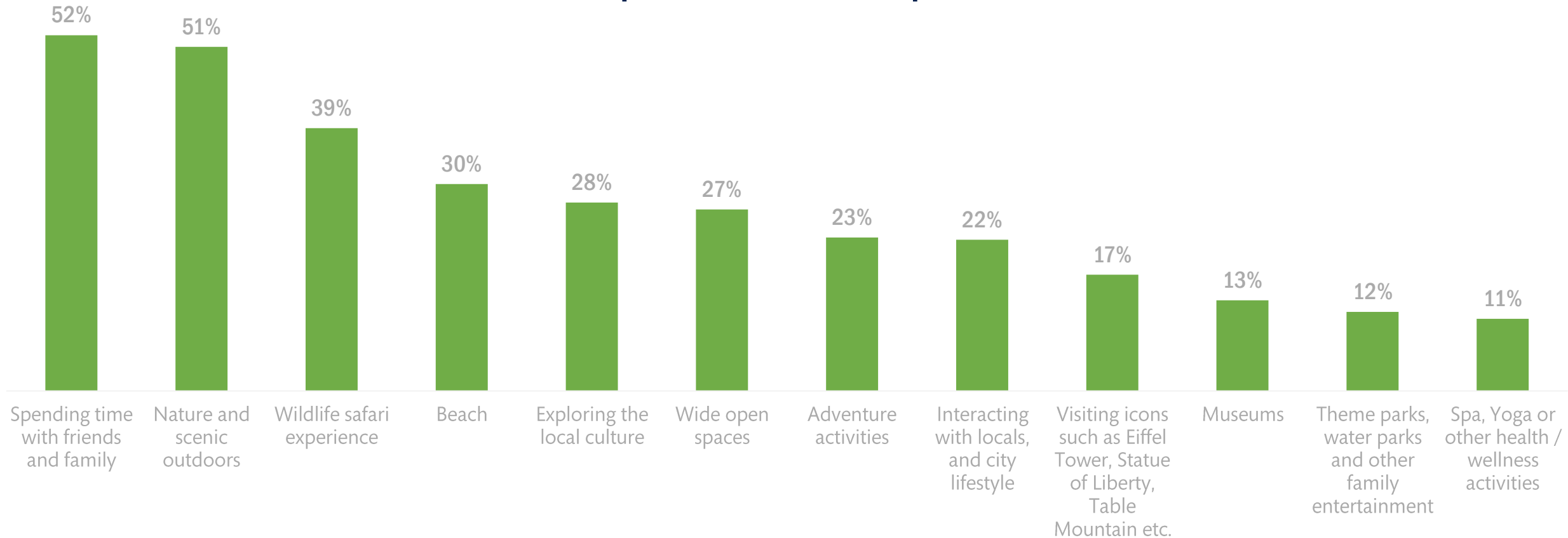
Leisure/Holiday is the main reason for travel followed by travel for business or work purposes.



EXPERIENCES SOUGHT ON THE FIRST TRIP

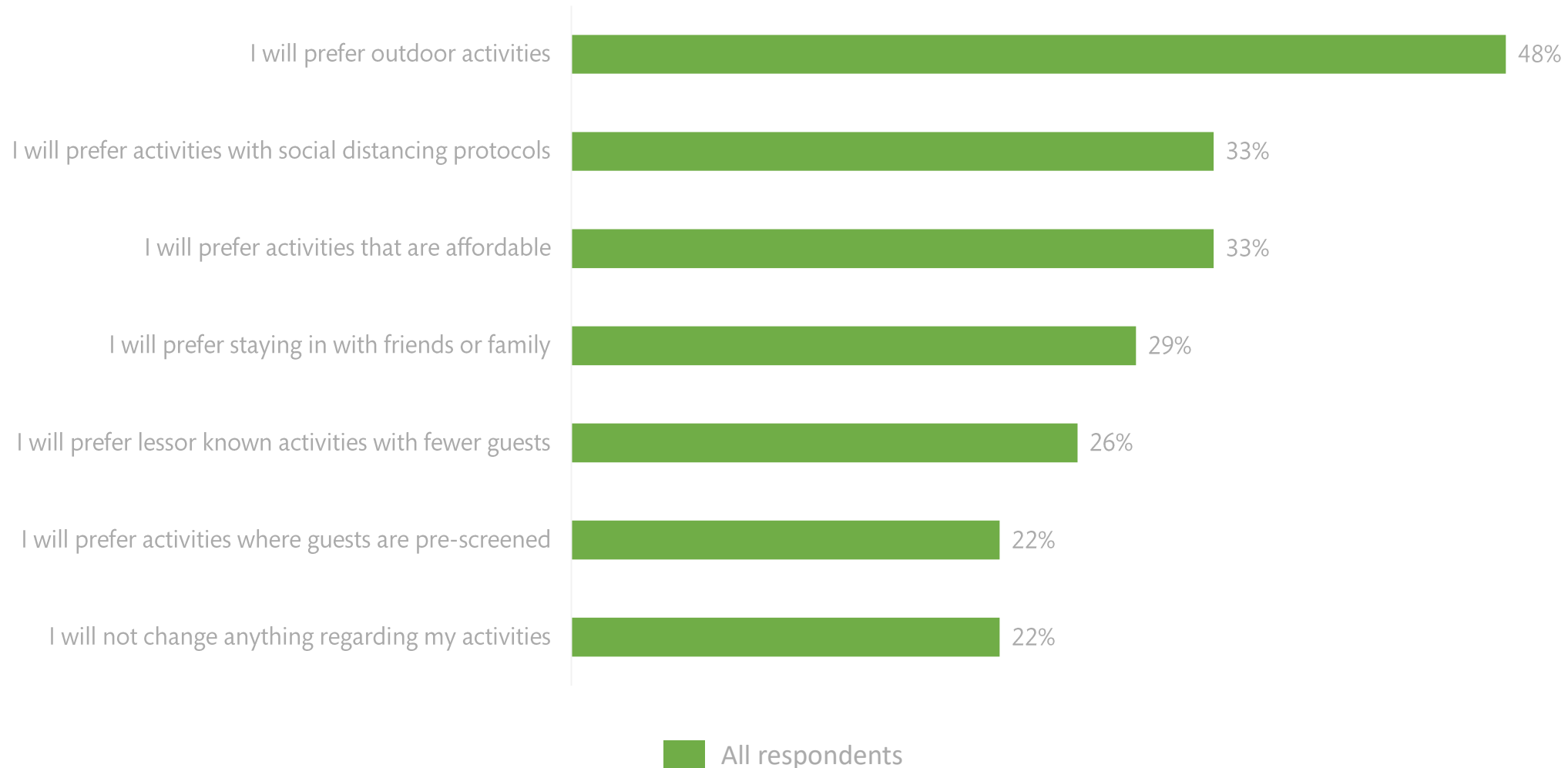
Close connections and nature are the prime experiences tourists are looking for on their next trip. There is a much lower interest in indoor experiences such museums, spa and family entertainment centres

Experiences on the first trip



Tourists are looking to engage in outdoor activities, with adequate social distancing protocols and affordable pricing.

Activities on the first trip



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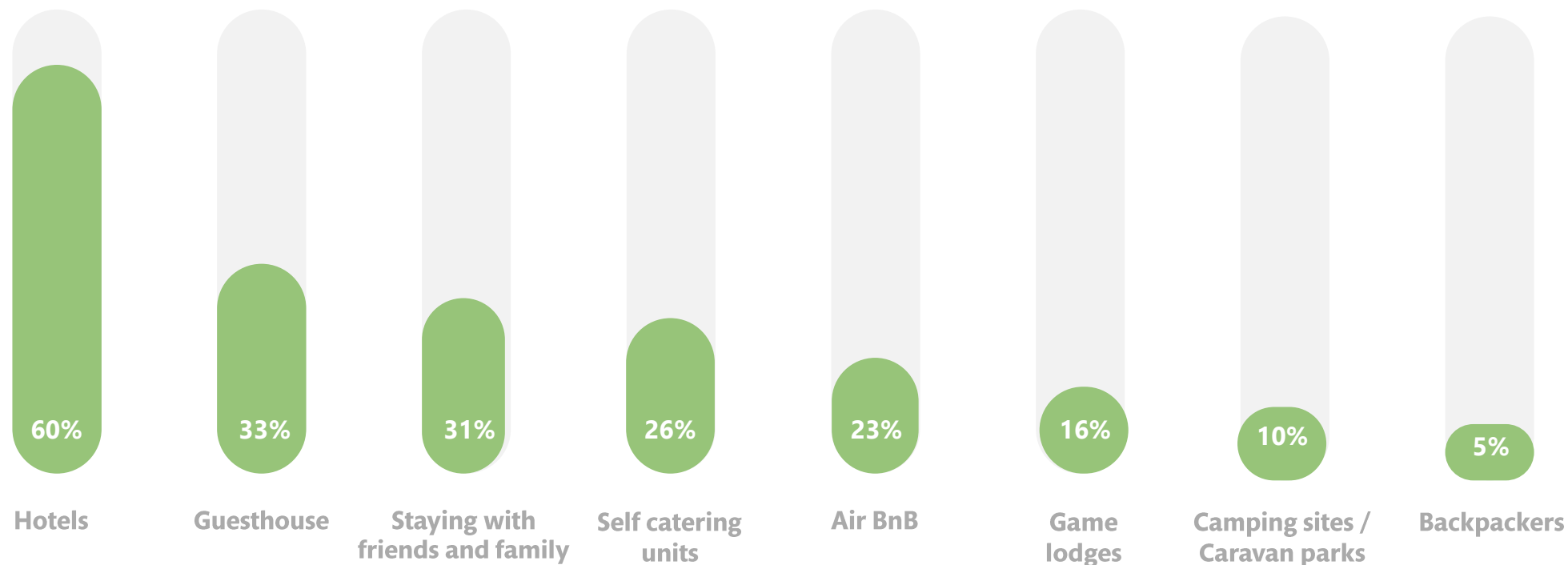
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CHOICE OF ACCOMMODATION

Hotels remain a popular accommodation option and tourists say they will prefer smaller properties. The preference for hotels is driven by Business and Holiday tourists. Affordability and smaller accommodation options are the biggest requirements from tourists.



44%

I will prefer accommodation that is affordable

40%

I will prefer smaller accommodation properties with fewer guests

33%

I will prefer establishments with clear communication about cleaning and safety protocols

28%

I will prefer staying with friends and family

19%

I will prefer establishments in remote areas away from the urban setting

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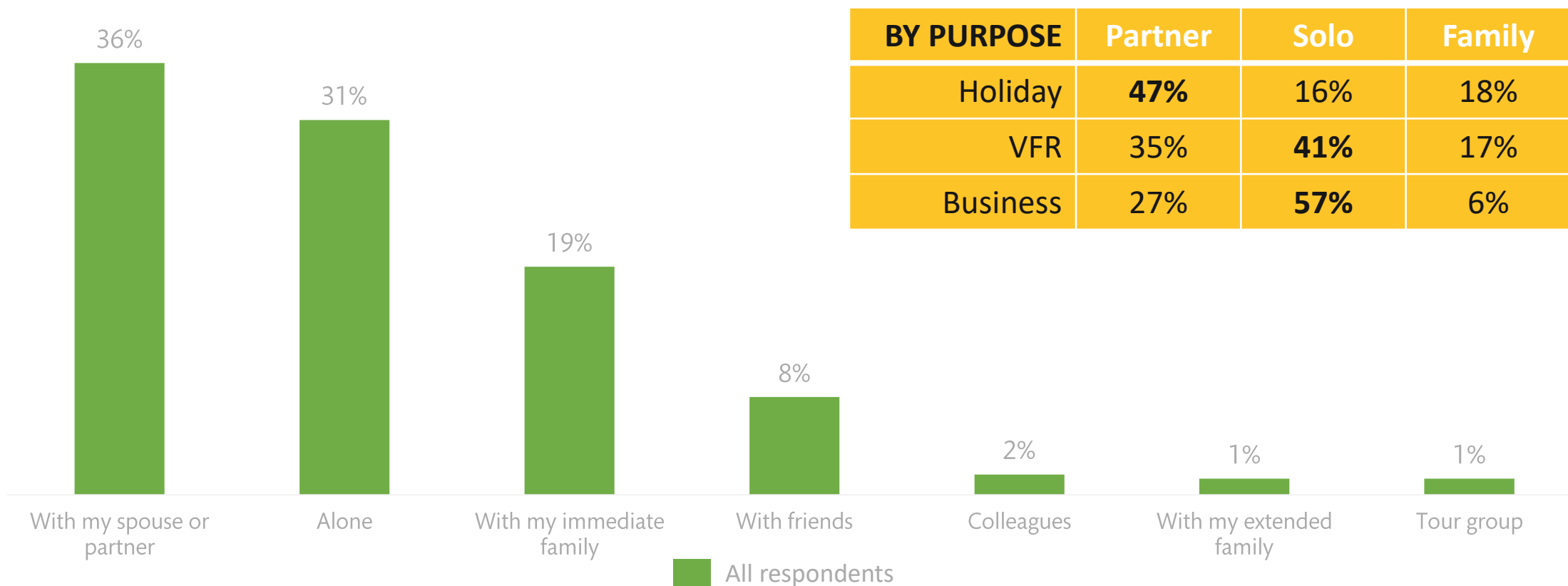
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TRAVEL COMPANION

Majority of tourists are most interested in travelling with their spouse or partner, taking solo trips or travelling with immediate family – across all purposes these remain top 3 with changes in order.

Business travellers and VFR more inclined to travel solo and Holiday tourists most inclined to travel with spouse or partner



BY PURPOSE	Partner	Solo	Family
Holiday	47%	16%	18%
VFR	35%	41%	17%
Business	27%	57%	6%

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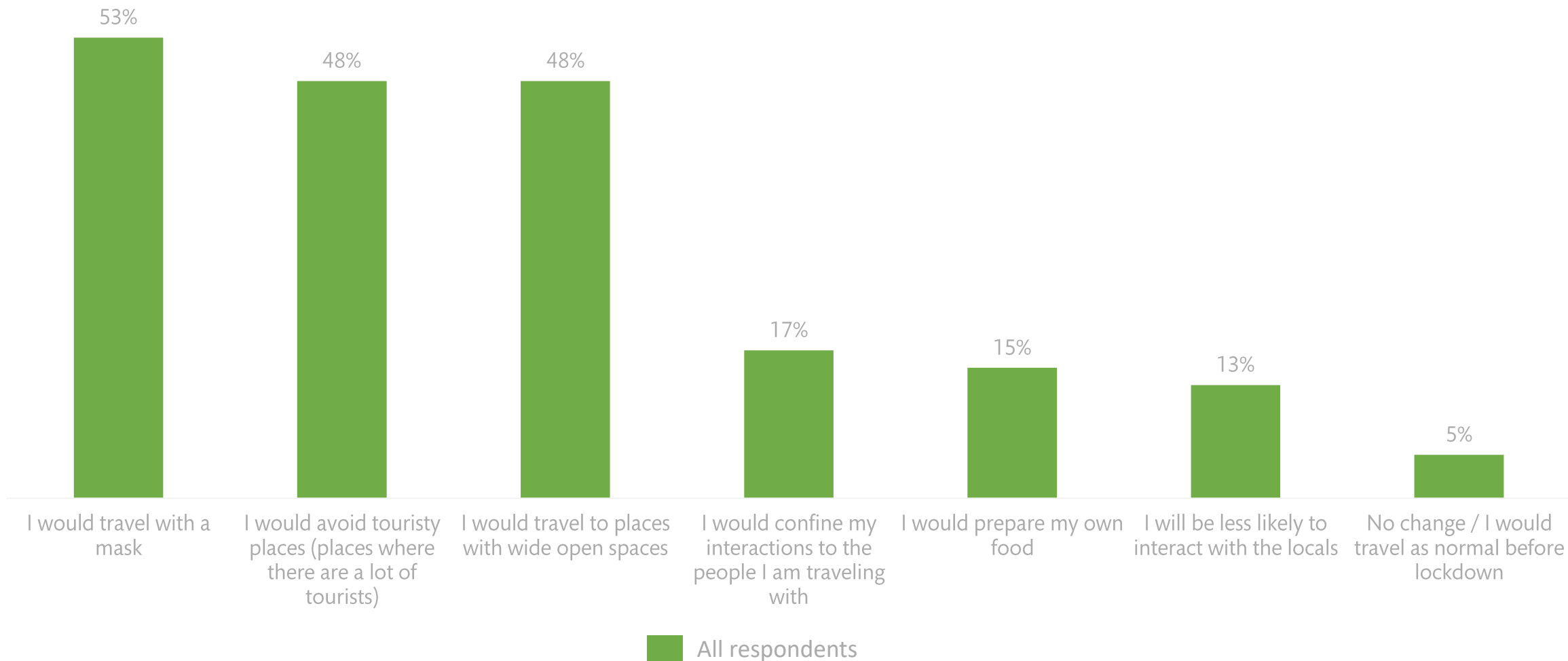
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TRAVEL DURING COVID-19

Tourists are most likely to travel with a mask, avoid touristy places and choose to travel to places with wide open spaces.

Following the COVID-19 pandemic how do you expect your travel behavior will change?



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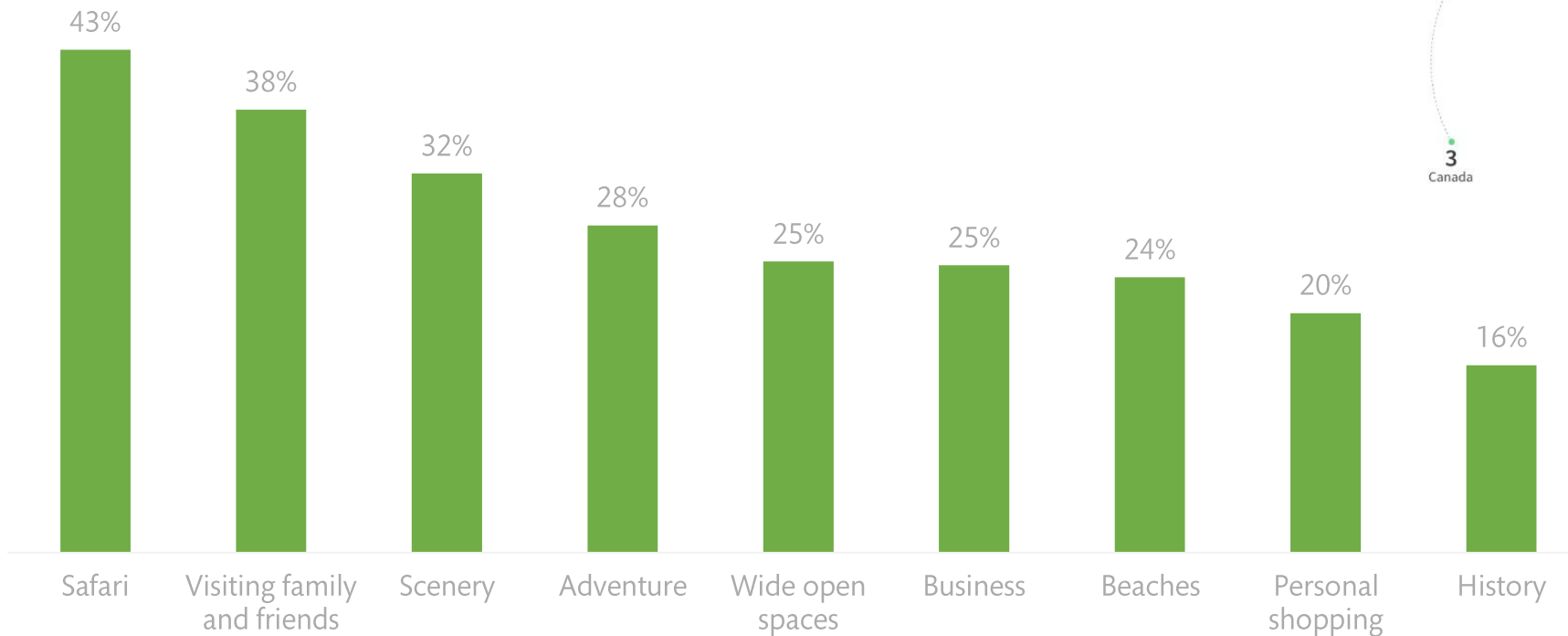
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MAIN REASON FOR VISITING SOUTH AFRICA

South Africa is a preferred destination and the key reasons for wanting to visit South Africa were: Safari, visiting friends and relatives and scenery

What would be your main reasons for wanting to visit South Africa?



Which destination would be the perfect post-Corona escape?



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MILLENNIALS TRAVELERS TO BE AT THE FOREFRONT RECOVERY

Younger generations show an eagerness to travel, however, many are likely to only travel upon the availability of a vaccine, or when deemed to be safe to travel again...

Younger travelers will very likely be key to many destinations' and travel providers' recovery. Destination Analytics reported that Millennial travelers will be at the forefront of the industry's recovery, due to their relatively higher sense of safety for themselves and travel activities, combined with the ability to motivate them to travel with discounts. Nearly 40% of Millennial travelers reported they will make travel at least a somewhat high priority in their lifestyle—double the number of Baby Boomers.

MILLENNIAL TRAVELLERS AT THE FOREFRONT OF TRAVEL



MILLENNIAL TRAVELLERS WILL BE FIRST TO MARKET



Younger travelers will very likely be key to many destinations' and travel providers' recovery. Millennial travelers will be at the forefront of the industry's recovery, due to their relatively higher sense of safety for themselves and travel activities, combined with the ability to motivate them to travel with discounts. Nearly 40% of Millennial travelers reported they will make travel at least a somewhat high priority in their lifestyle—double the number of Baby Boomers ¹.

INTERNATIONAL MILLENNIAL TRAVELLERS

Travel as soon as possible, or within a year of restrictions being lifted

INTERNATIONAL TRAVELLERS



62%

INTERNATIONAL MILLENNIAL TRAVELLERS



68%

Experiences wanted on the first trip



59%

Visiting friends and family



57%

Nature and Scenic Outdoors



38%

Beach



36%

Wildlife

Choice of accommodation



53%

Hotels



36%

Guesthouses



32%

Staying with
friends &
family



30%

Air Bnb

Main reason for wanting to visit South Africa



38%

Safari



38%

Scenery



35%

Adventure



33%

Beaches /
Visiting Friends
and Family

How will they travel differently



50% will
travel with a
mask



45% will travel to
places with wide
open spaces

**36% will avoid touristy
places which is lower
than the average
international traveller
(48%)**