



UNLOCKING THE
DOMESTIC MARKET



SOUTH AFRICAN TOURISM



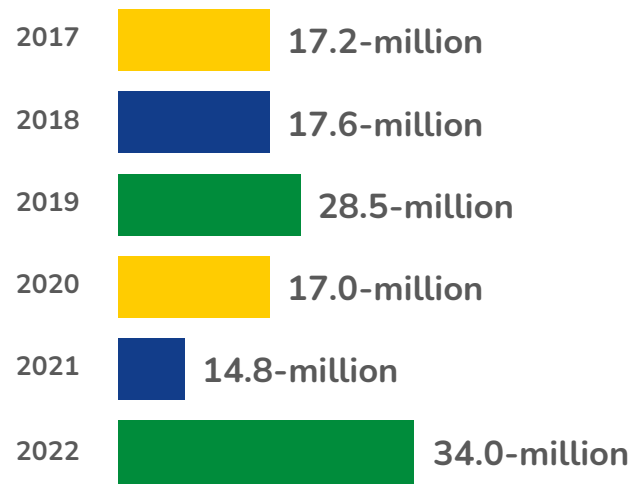
Domestic trips



34.0 million domestic overnight trips were taken in 2022. This **exceeded 2019 figures by 19,6%** (28.5 million overnight domestic trips in 2019). For the same period, 9.2 million holiday trips were taken.

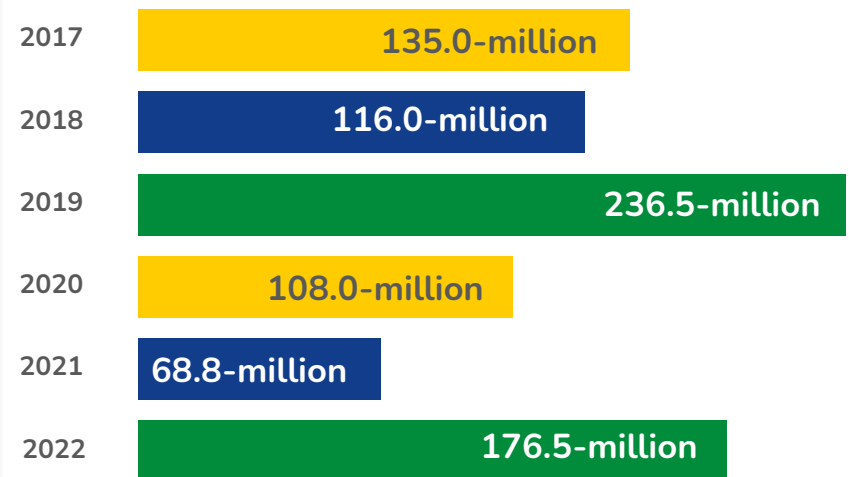
Overnight trips (longer than a day)

Actual trips:

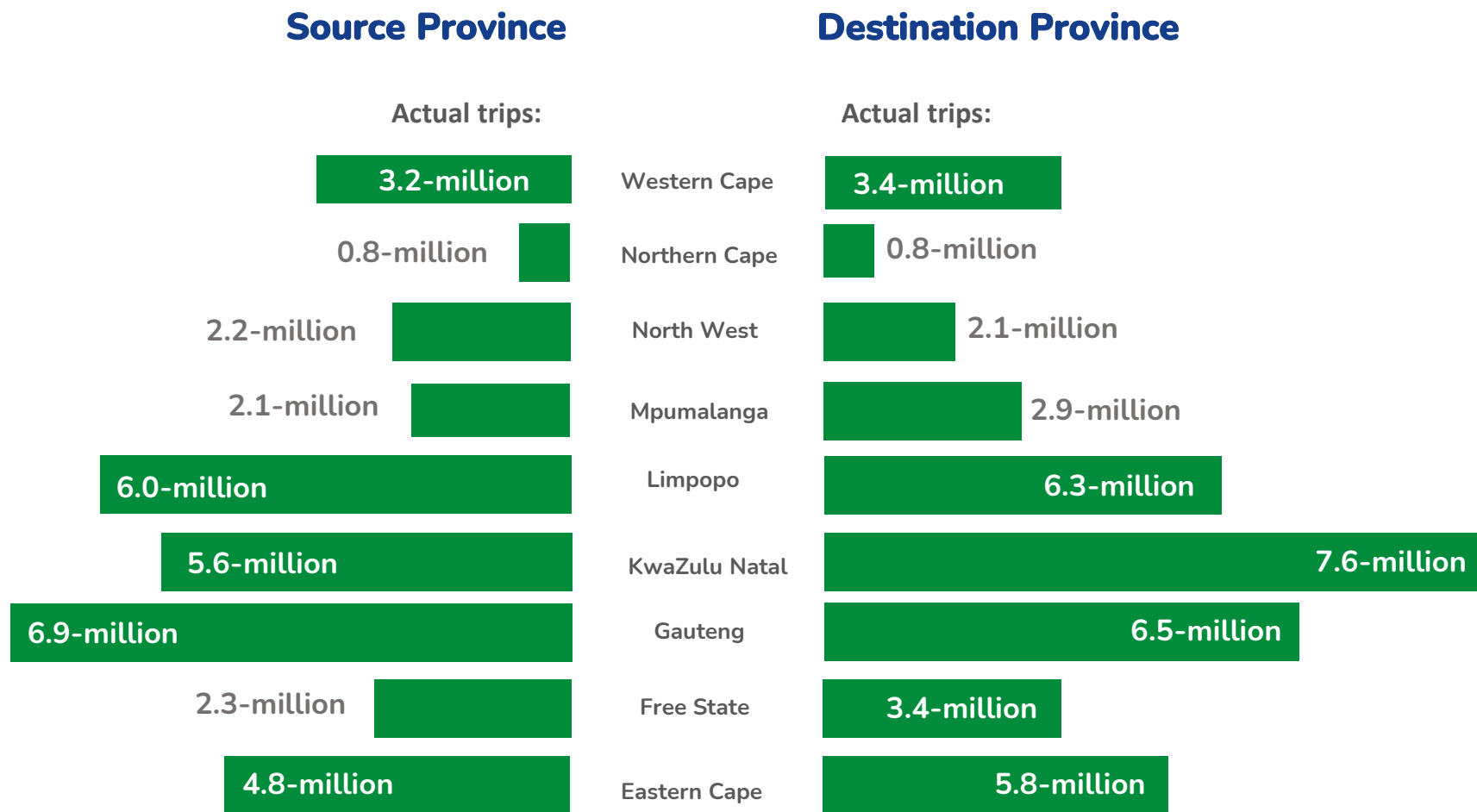


Day trips

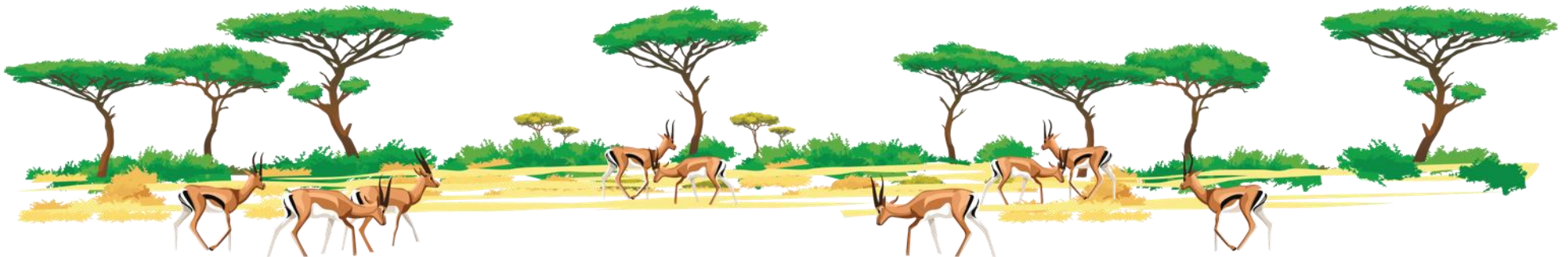
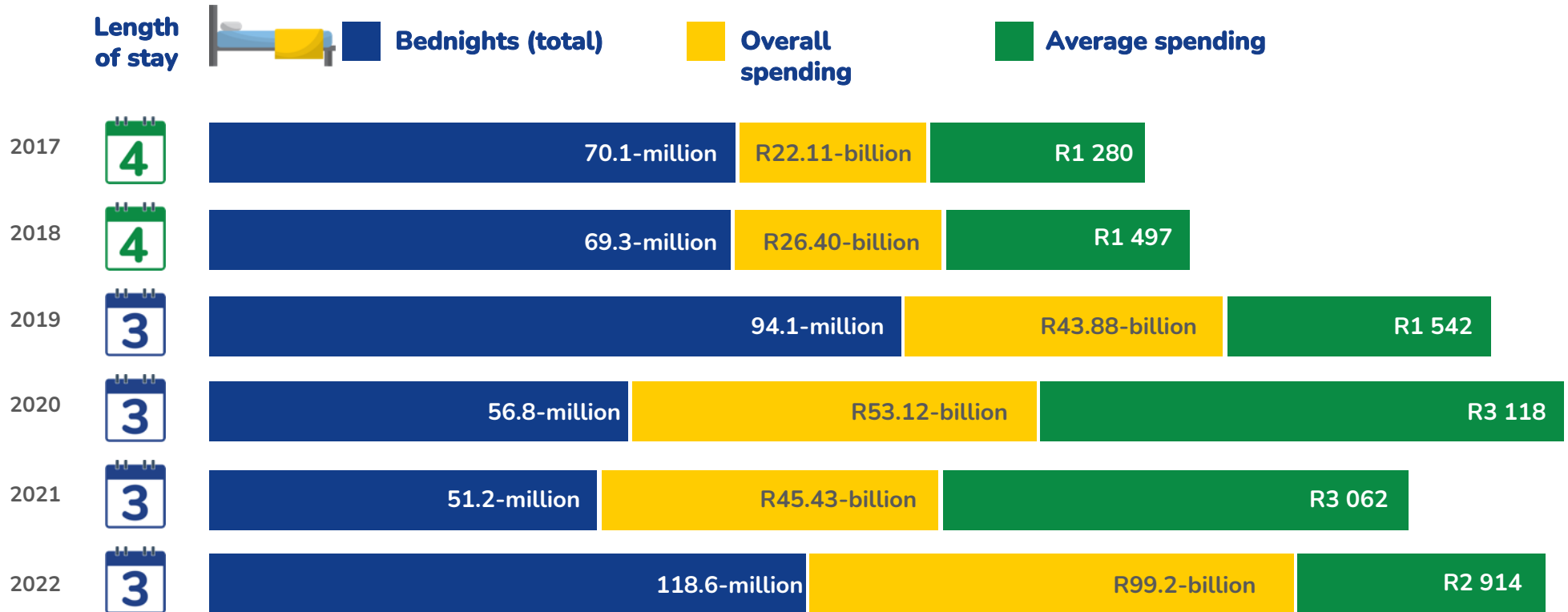
Actual trips:



Domestic trips



How long were South Africans' trips, and what did they spend?



Source: SAT Domestic Survey 2022 (January – December)

Why go?

Top two reasons to travel

2019

Visiting friends
and relatives
53%



Holiday
25%



2022

Visiting friends
and relatives
44%

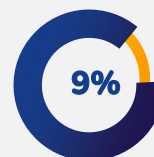
Holiday
27%

Most South African domestic travellers travel to **visit friends and relatives**. However, the proportion of travellers taking trips for other reasons has increased over the past few years, with the proportion of travellers visiting friends and family decreasing.



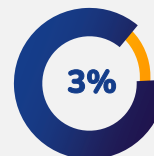
Who's going?

2019

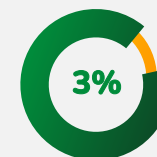


Coloured

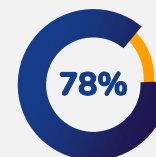
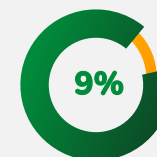
2022



Indian



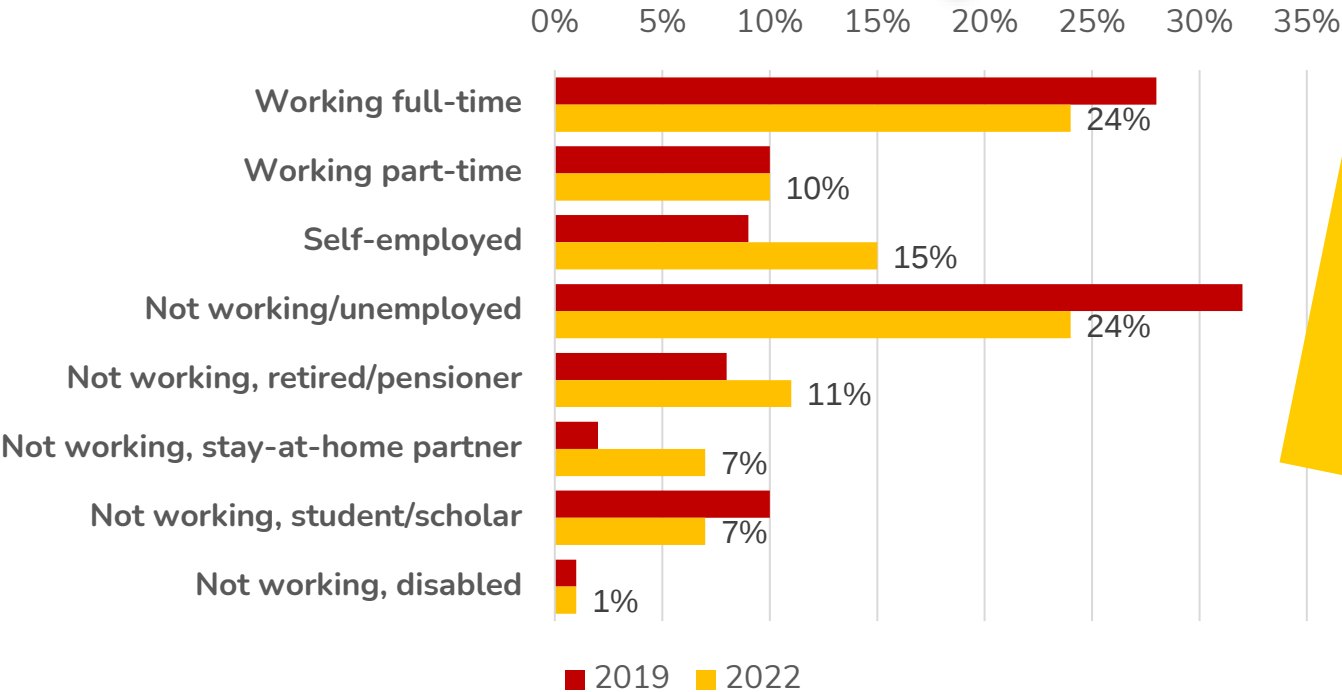
White



Black



Employment status of South African travellers



Half of the South African travellers were not working for various reasons. Some were studying or stay-at-home partners, with about a quarter working full-time



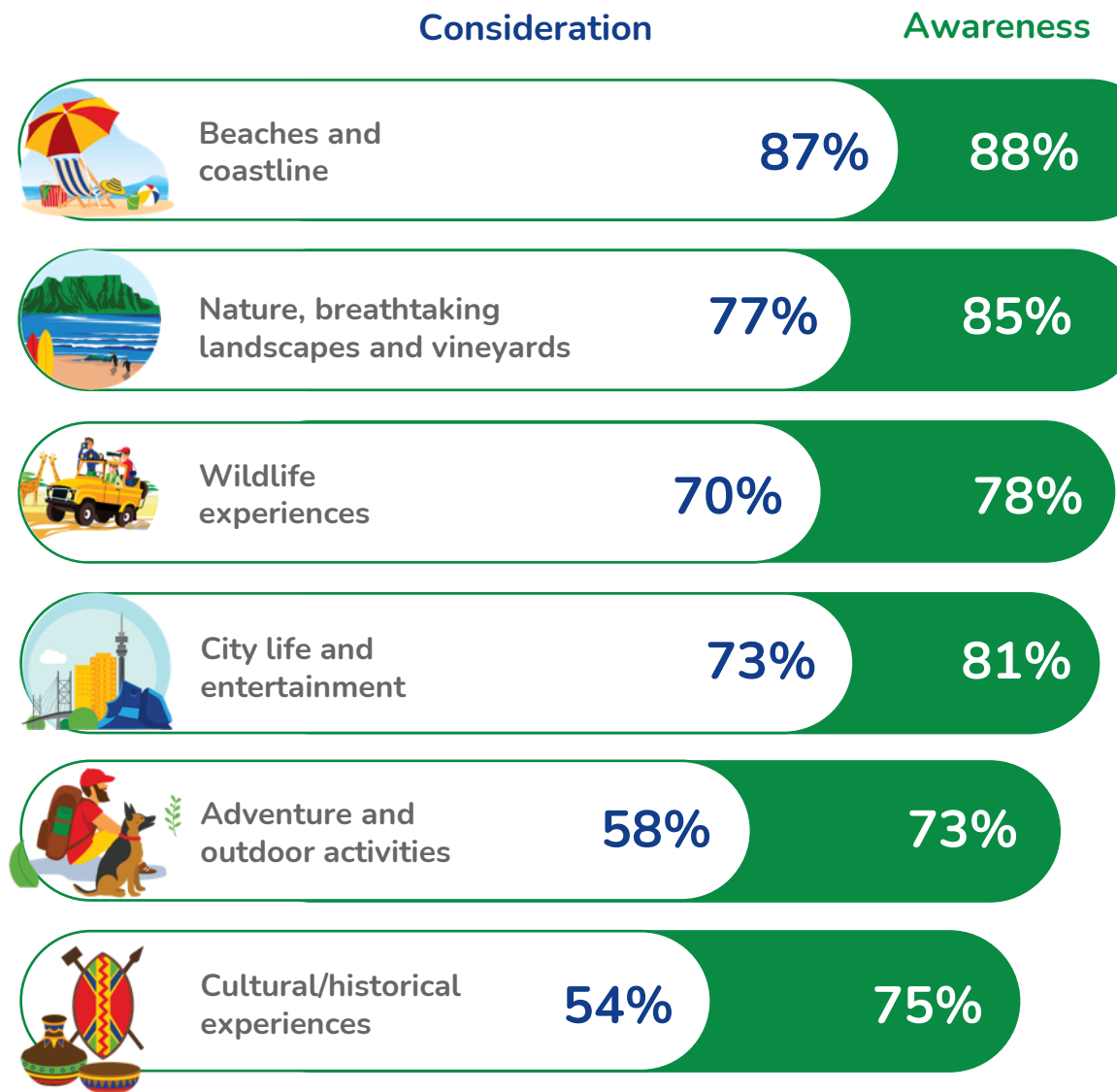
Source: SAT Domestic Survey 2022 (January – December)

3 KEY MARKETING SEGMENTS: Build, Convert and Defend

South African Tourism
predominantly focuses on three
marketing segments in the
domestic market, build, convert,
and defend. The research insights
from these three segments are
outlined below:



South Africans' awareness and consideration of domestic travel options



More than 2/3rd of travellers are aware of all experiences among which 'beaches and coastlines' and 'nature, breathtaking landscapes' are the most considered experiences



Why South Africans like traveling in SA – in order of preference:



1. I want to **explore more of South Africa**, because my country has so much to offer



2. It's easier to go on a **spontaneous** trip within South Africa



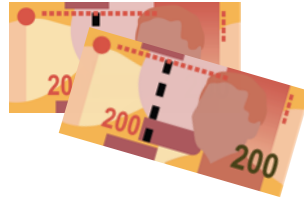
3. I travel within South Africa as the money I spend on trips **benefits my country/community**



4. Destinations within South Africa are better **suited to my taste**



5. I prefer taking **shorter, more frequent** trips within South Africa



6. I do not have the **budget** to allow me to travel outside South Africa



7. I would prefer a **luxury trip in South Africa** over an economical trip outside South Africa



8. I prefer travelling to places that **are close to my home**



9. My **peers** always travel within South Africa, which is why I prefer it



10. I worry about **how I may be treated** in another country



11. I do not have sufficient **time** to travel outside South Africa

94%

of South Africans say they plan to go on holiday in their own country in the future

87%

of South Africans plan to go on a domestic holiday trip in the next 12 months

Ready to go

Preferred Reasons to travel

42%



Explore beautiful scenery

31%



Relax at the beach

28%



Visit friends and relatives

25%



Engage in a variety of activities

20%



Go on safari

19%



Experience different cultures

15%



Fulfil a dream

15%



Friends/family recommended it

14%



Enjoy the warm climate

13%



Visit historic sites

Preferred Reasons not to travel

43%



Other higher-priority expenses

41%



Insufficient time

20%



Hard to find affordable accommodation

15%



Health issues

10%



Hard to find information

10%



Concerns for my personal safety

10%



Bad climate

8%



Not comfortable with the type of people I might meet

8%



Afraid of civil unrest

7%



Find it hard to book transport

How do South Africans plan their trips?



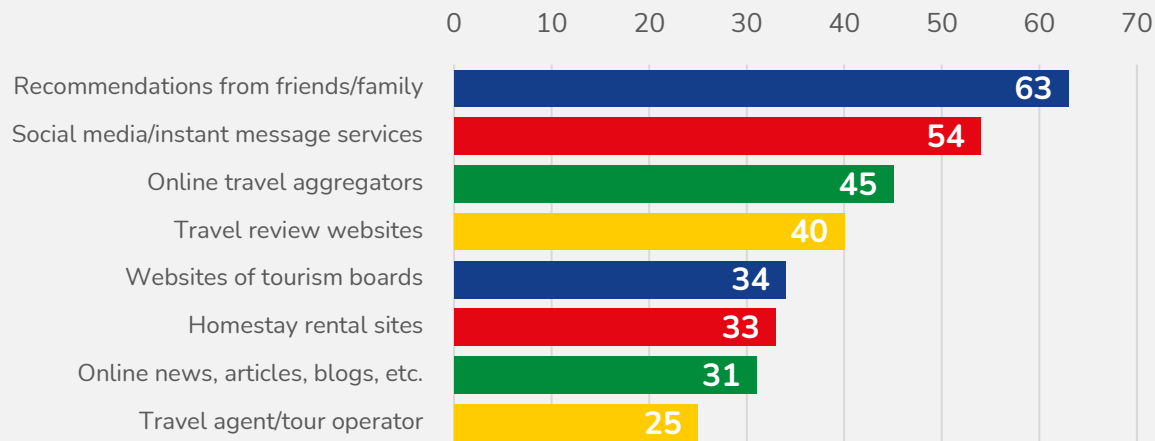
More than half rely on recommendations from **friends and family, or social media**



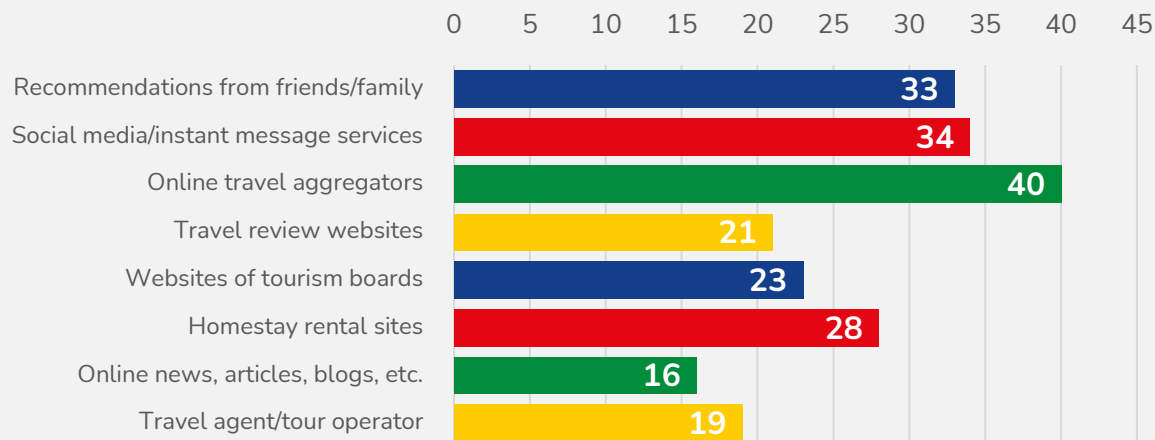
Nearly half use **online travel aggregators** to make their travel bookings



Channels used when researching a trip



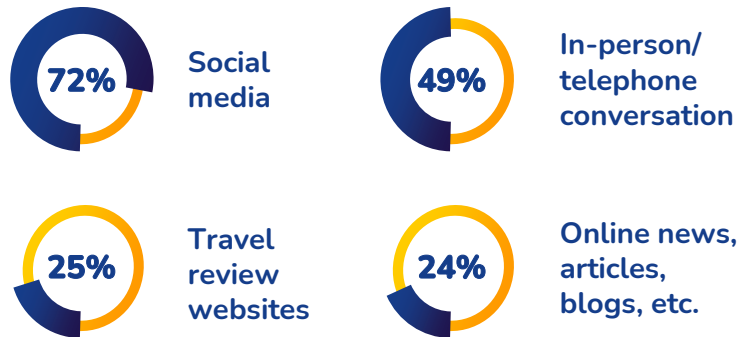
Channels used/referred to when booking a trip



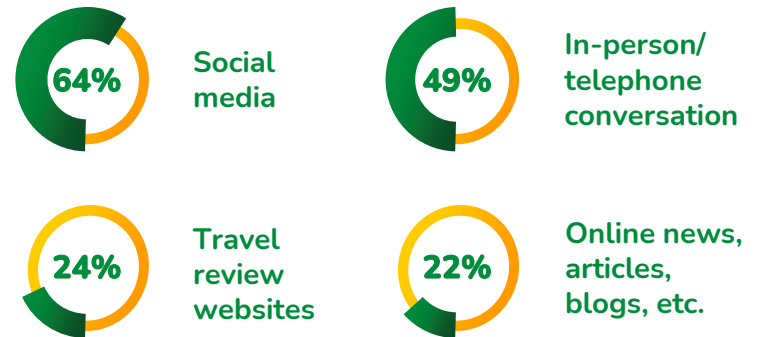
When sharing their holiday experiences, South Africans' preferred channels are **social media**, or **person-to-person** or **telephone** conversations

Preferred channels for sharing

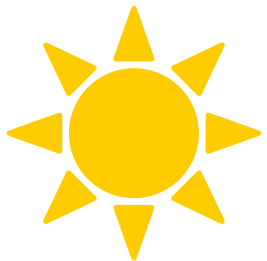
Channels used to share details of holiday experiences during trips



Channels used to share holiday experiences after trips



When to go?



More than half of South African travellers prefer to travel when it is **warmer and during school holidays**



Who do South Africans like to travel with, domestically?

Preferred travel companions

Most domestic travellers prefer to travel with **family or friends**; very few prefer travelling alone or with a tour group.



Family

61%



Friends

59%



Spouse/partner

47%



Family with children

35%



Parents

21%



Colleague

20%



Alone

14%



Church community

7%



Tour group

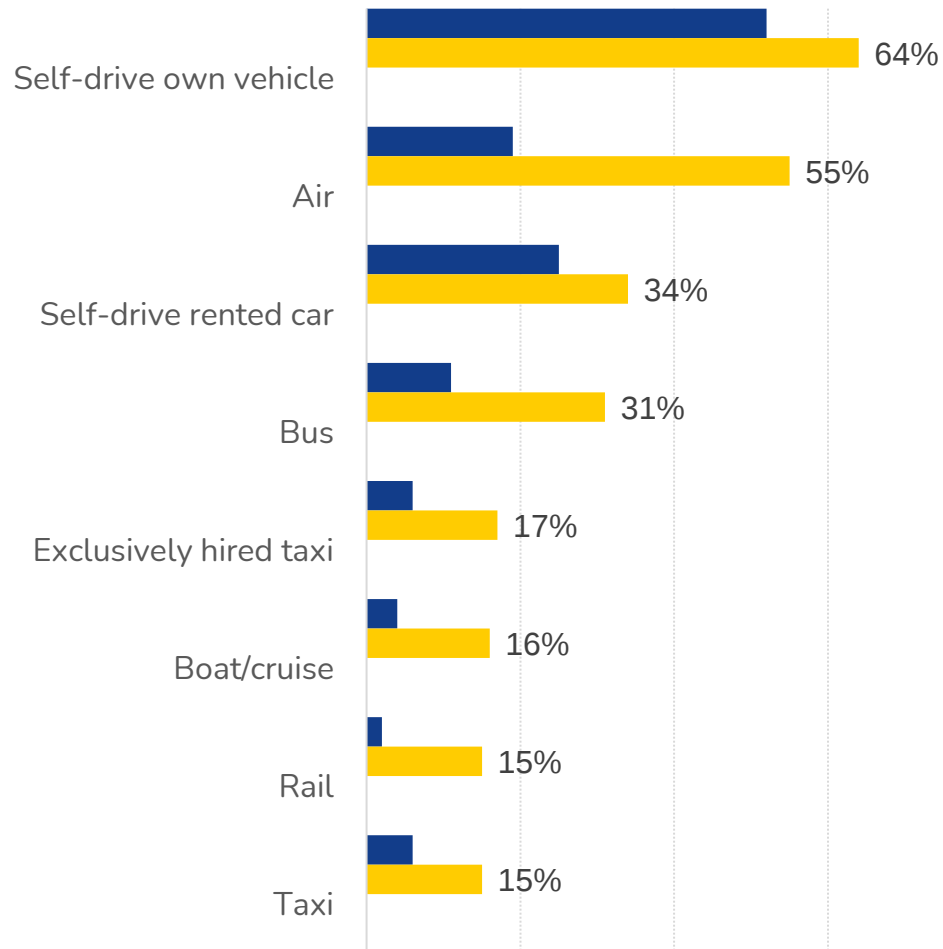
7%

Preferred transport mode

Most South African domestic travellers prefer to drive themselves

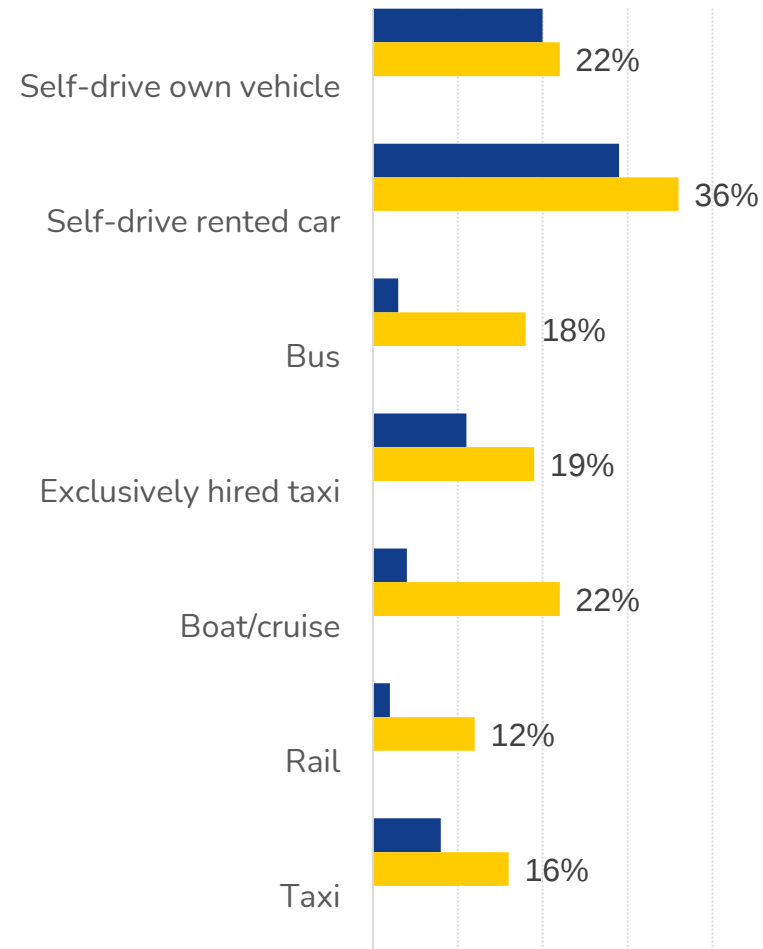
To destination

0% 20% 40% 60% 80%



At destination

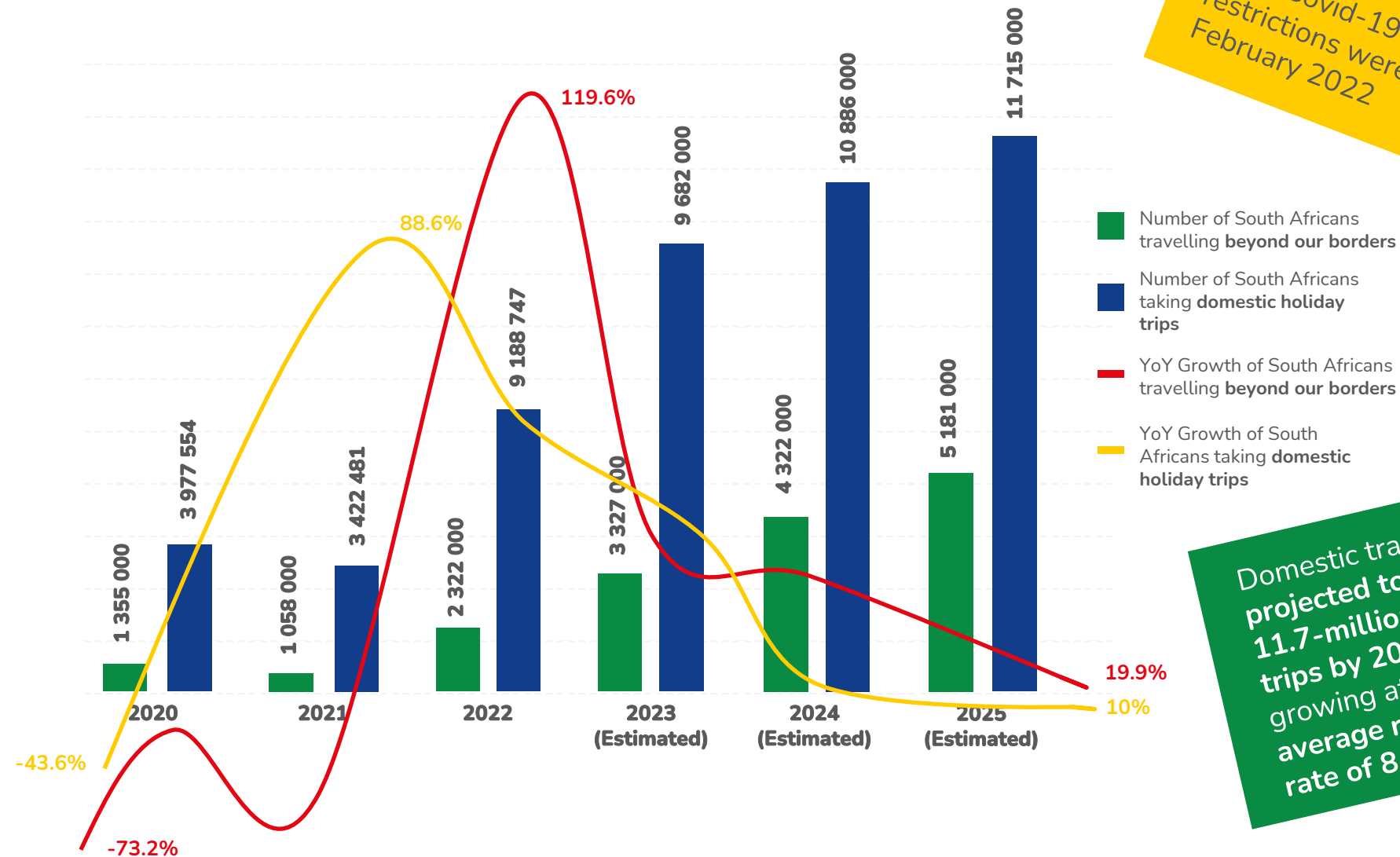
0% 10% 20% 30% 40%



■ 2020 ■ 2022

Outbound vs Domestic Travel

Outbound travel for South Africans vs domestic holiday travel



The number of domestic holiday trips South Africans took **increased from 2021 to 2022**. Most Covid-19 travel restrictions were lifted in February 2022

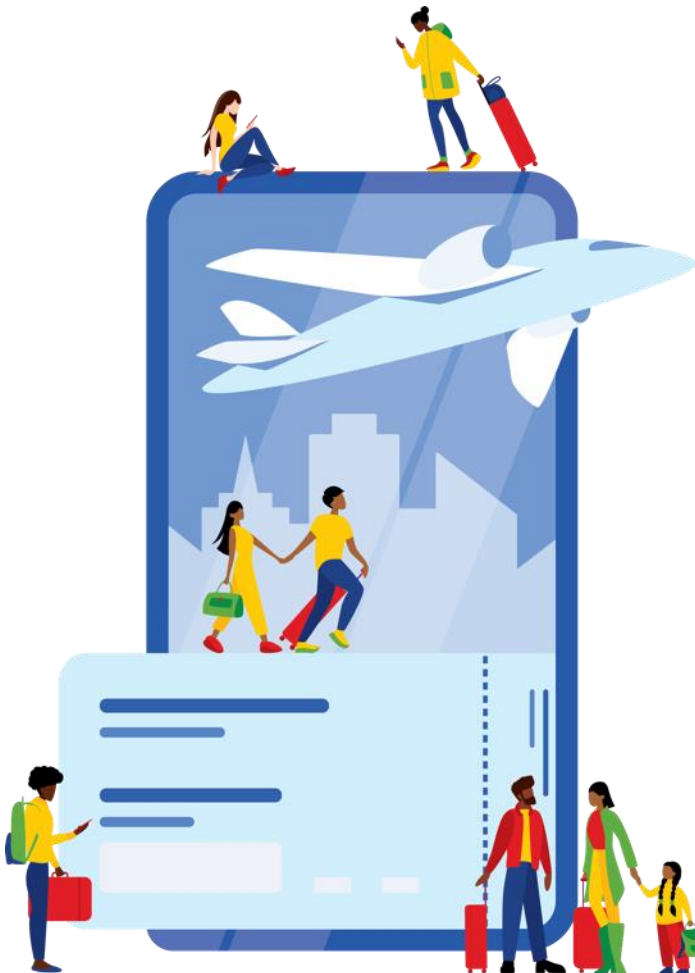
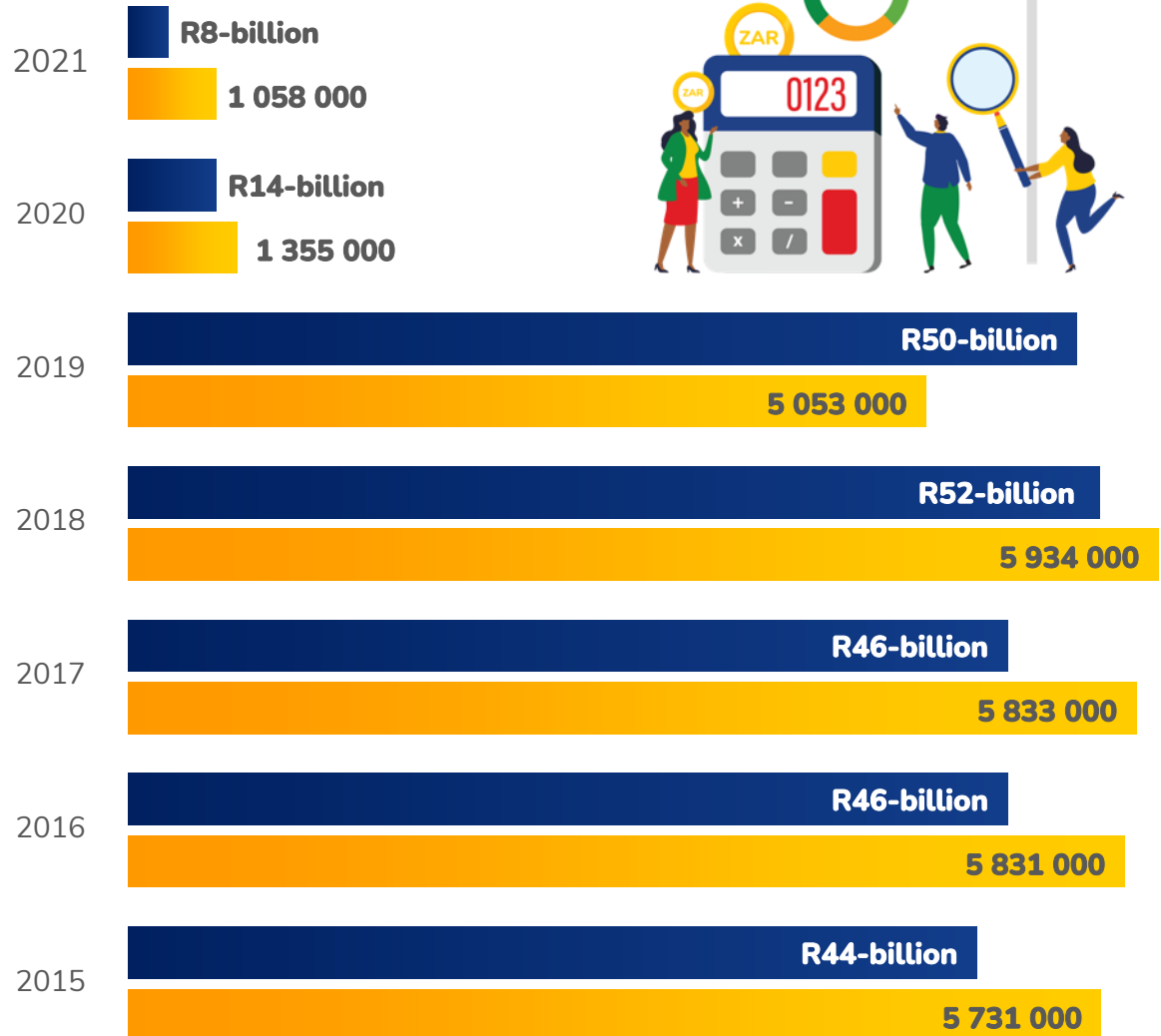
Domestic travel is projected to reach **11.7-million holiday trips by 2025** and is growing at an average recovery rate of **8.8% a year**

In 2019, outbound travel from South Africa reached **5-million trips**

How much do South Africans spend while on an outbound trip?

Outbound travel and spending

■ Outbound Spend ■ Outbound Trips

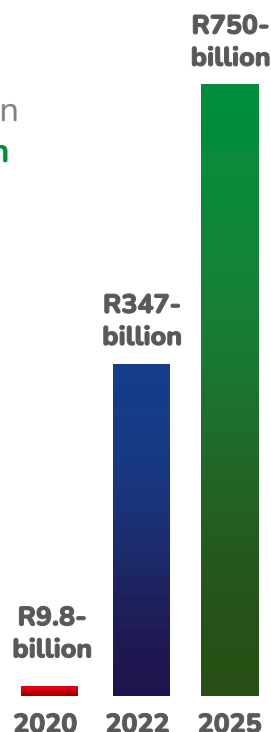


Destinations for outbound travel

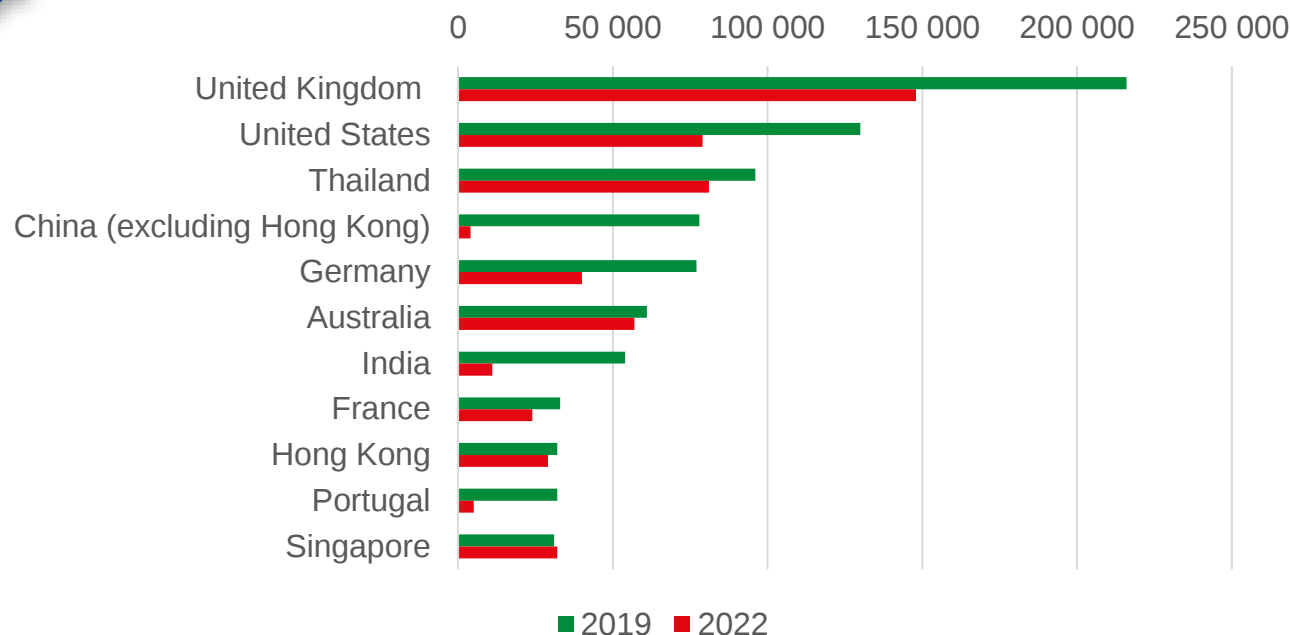
South Africans are once again **travelling regionally and internationally** after emerging from the travel hiatus caused by the Covid-19 pandemic

In **2020**, South Africans contributed an estimated **R9.8-billion** to outbound leisure travel.

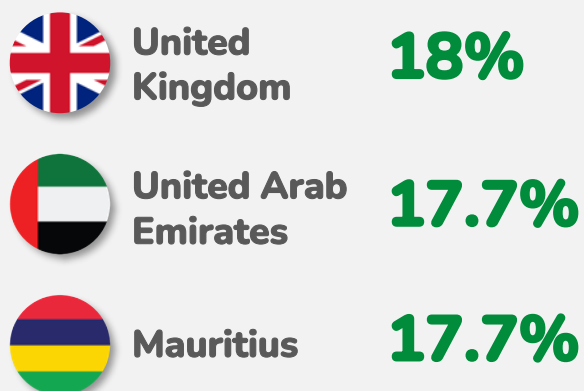
It is estimated that they spent up to **R347-billion in 2022** and this phenomenal rebound is projected to reach **R750-billion by 2025**



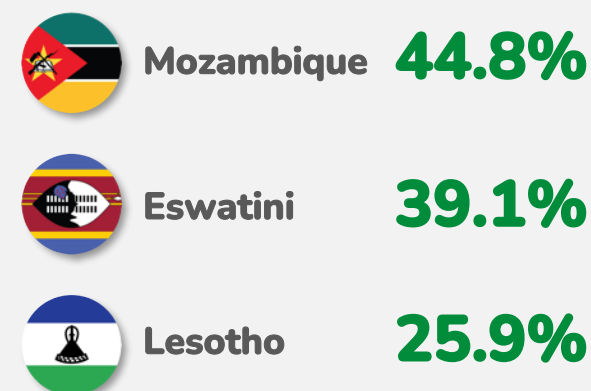
Long-haul outbound travel comparison



Top three international destinations for South Africans



Top three regional destinations for South Africans



Domestic Key Trends

1

Drivable Destinations

- Drivable destinations are the top choice, with experiences or tours popular for South Africans (46%).
- South Africans continue to prefer road trips when going to the favourite destinations.
- We need to continue promoting road trips along with day trips.

2

Marketing and Sustainability

- Marketing (19%) and sustainability (19%) are the top investment priorities for travel professionals in 2023.
- Continuous marketing is imperative to keep travelling in South Africa top of mind.

3

Reviews

- South African travellers value customer reviews when making a booking decision with 69% of South African travel professionals acting on negative reviews.
- South African (60%) travel professionals believe consumers will use providers who respond to negative reviews.

Domestic Key Trends

4 Always On Digital

- 59% of South Africans find travel inspiration on social media.
- South Africans (70%) emphasise finding the best price online.
- Always on social media and an online platform where South Africans can search for best deals are critical.

5 Loyalty Programmes

- South Africans (60%) are concerned about inflation affecting their travel plans in the next year.
- South African consumers value loyalty programmes most.

6 Self Care

- Nearly half (46%) of people say travel is more important to them now than it was pre-pandemic.
- South Africans prioritize relaxation, wellness, and new experiences when travelling.
- To cope with everything that has happened in the past 2 years, self-care is now non-negotiable.

Get In Touch



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