

SAT Segmentation Study

India 

Segment Personas

2026





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**Context &
Objectives**

02.

Segmentation
Outcome

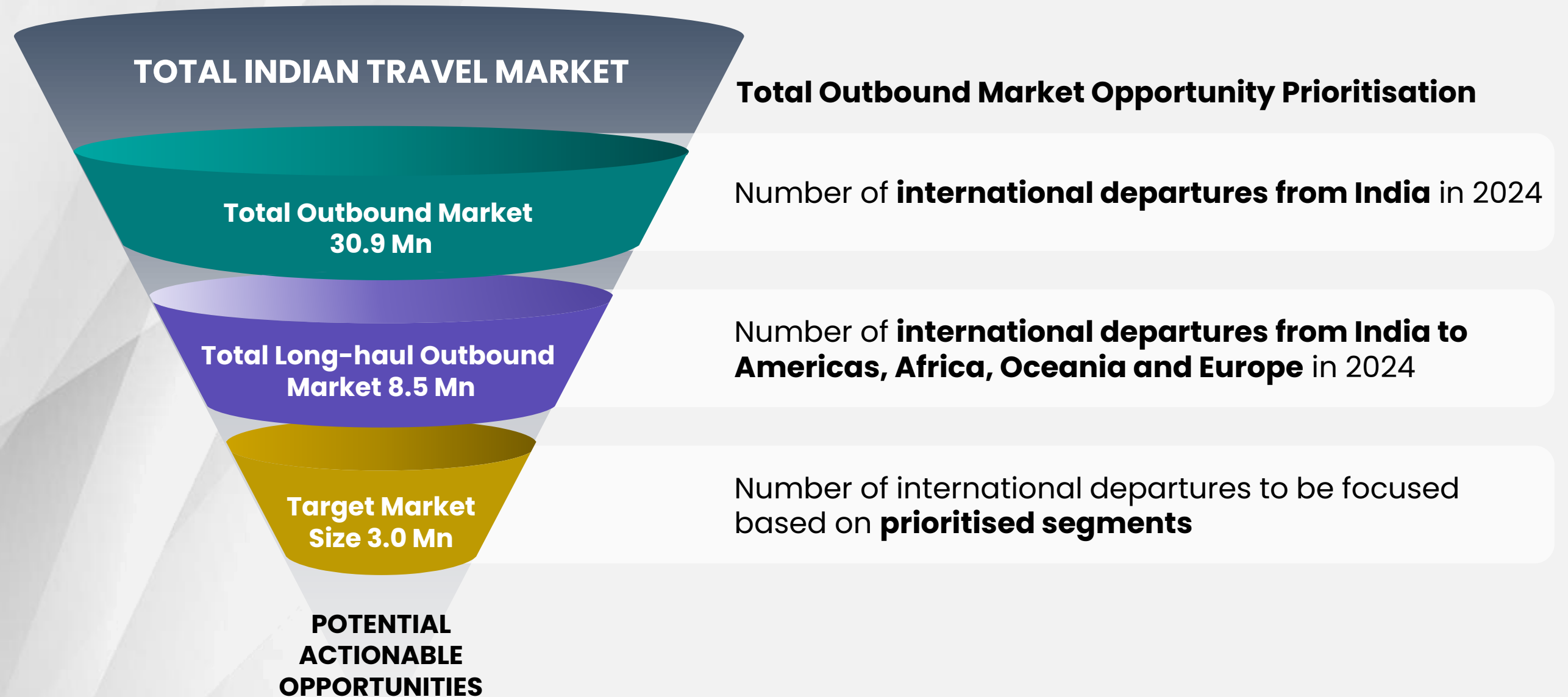
03.

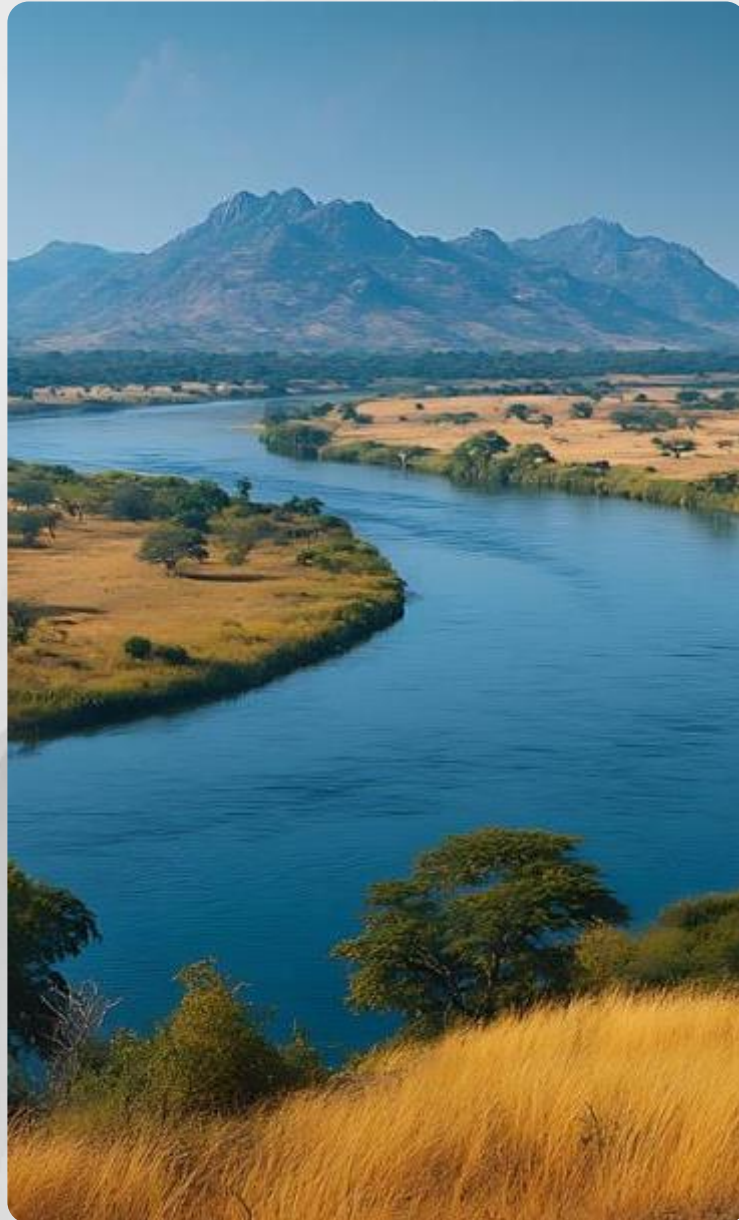
Segment Personas

04.

Cross-segment
Analysis

STUDY CONTEXT (1/2)





SA Tourism has commissioned this study to devise an approach to effectively target the Indian market by refreshing their understanding of the key traveller segments

Existing Segmentation (2012)

This study was conducted with an objective to **segment Indian travellers** into groups that share similar needs and behaviours, based on which three priority segments were identified, and recommendations were provided to increase arrivals to South Africa

Segmentation Refresh (2025)

The objective of this study is to **refresh the segments**, to ensure their relevance in the current macro-economic scenario – enabling effective targeting of the travellers in the Indian market

OUTCOMES

As the result of the segmentation exercise in 2012, the **targetable market in India was divided into 15 segments**

Of the 15 segments, **3 segments were identified** as key on account of them being worldly travellers and highest spenders

Refreshed understanding of the segments – relevant to the current macro-economic environment – will be developed; refreshed messaging and communication platforms, underpinned by the needs and behaviour of the current environment, will be defined



WHY TRAVELLER SEGMENTATION IS IMPORTANT?

Traveller segmentation enables SAT to market the destination more effectively by focusing on prioritised traveller segments instead of the entire market. Segments are prioritised based on value and volume potential, the destination's ability to win, and travellers' likelihood to visit—maximising marketing impact and ensuring more efficient use of resources

SEGMENTATION HELPS IN CREATING:

1. Optimised Marketing and Communications Strategy

Enables **targeted messaging** and more **effective media planning**

Informs the **channel mix and content strategy**, ensuring the right messages reach the right audiences at the right time

4. Optimal ROI Strategy

Provides insights to guide **optimal allocation of marketing resource**

Helps **anticipate demand shifts** (seasonal or demographic) and **maximise shoulder and off-season visitor flows**



2. Nuanced Product and Experience Strategy

Identifies **unmet needs and opportunity areas** (activities/experiences sought) to inform product or experience design

Enables **customisation or personalisation** of offerings to better meet the preferences of different traveller segments

3. Curated Travel Trade Strategy

Supports **identification and prioritisation of trade partners** aligned with key traveller segments

Define **optimal targets for trade** based on priority traveller segments considering travel motivations, booking behaviour, spending patterns, and seasonality



BUSINESS AND RESEARCH OBJECTIVES

The study aims to **assess travellers' demographics, travel motivations, preferences, behaviours, and decision-making patterns** for the refreshed segments to inform targeted marketing and promotional strategies



Traveller Profiles

Detailed traveller profiles of the key traveller segments providing insights into their preferences, motivations, and behaviours



Travel Patterns

Analyse the travel patterns of Indian outbound travellers, including peak travel periods, preferred destinations, spending behaviour, and travel companions

Understand factors influencing travel decisions



Competitive Analysis

Evaluate the level of awareness and appeal of competitive destinations

Identify the key triggers and motivations that drive Indian travellers to choose competitive destinations



Purchase & Payment Behaviour

Insights into how travellers purchase travel services (online, offline, via agents, etc.)

Preferred travel payment methods



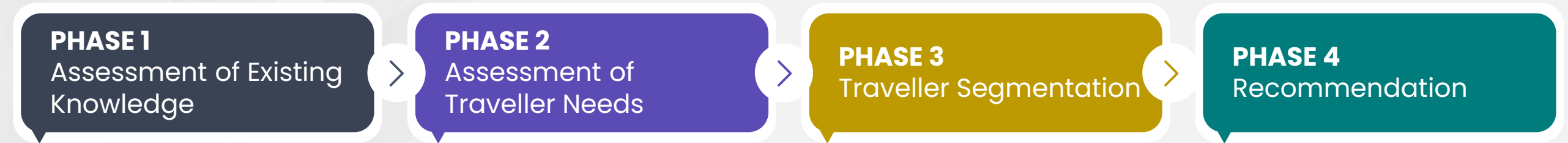
TARGET AUDIENCE

The respondents were selected basis their demographic profile, role in travel decision making and their travel history

SAMPLE SIZE (N) = 800	
SELECTION CRITERIA	SCREENING DETAILS
 Age	18-65 years
 Gender	Males, Females, and others
 Annual Household Income	Have income more than INR 1,700,000
 Residence	Residents of India (residing for more than 9 months in a year in India)
 City Tier of Residence	Reside in Metros / Tier 1 / other cities
 Decision-maker	Have influence in travel decision making
 Travel History	Have travelled to a long-haul international destination for leisure or holiday outside Asia and the Middle East at their own expense in the past 2 years



PROJECT PHASES



KEY AGENDA

Discussions with internal stakeholders and review of existing data to assess what we know and what we want to know

Identification of key themes
Assessment of customer needs and segment attributes
Identification of **insight platforms**

Segment identification
Development– deployment of **typing tool & logics** to identify segments
Identification of **priority segments**

Create **segment personas**
Share **insights to successfully tap** into these segments for growth



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SEGMENTATION OUTCOME

The final segmentation frame consists of 15 long-haul traveller segments, derived from rigorous demographic modelling and predictive analysis

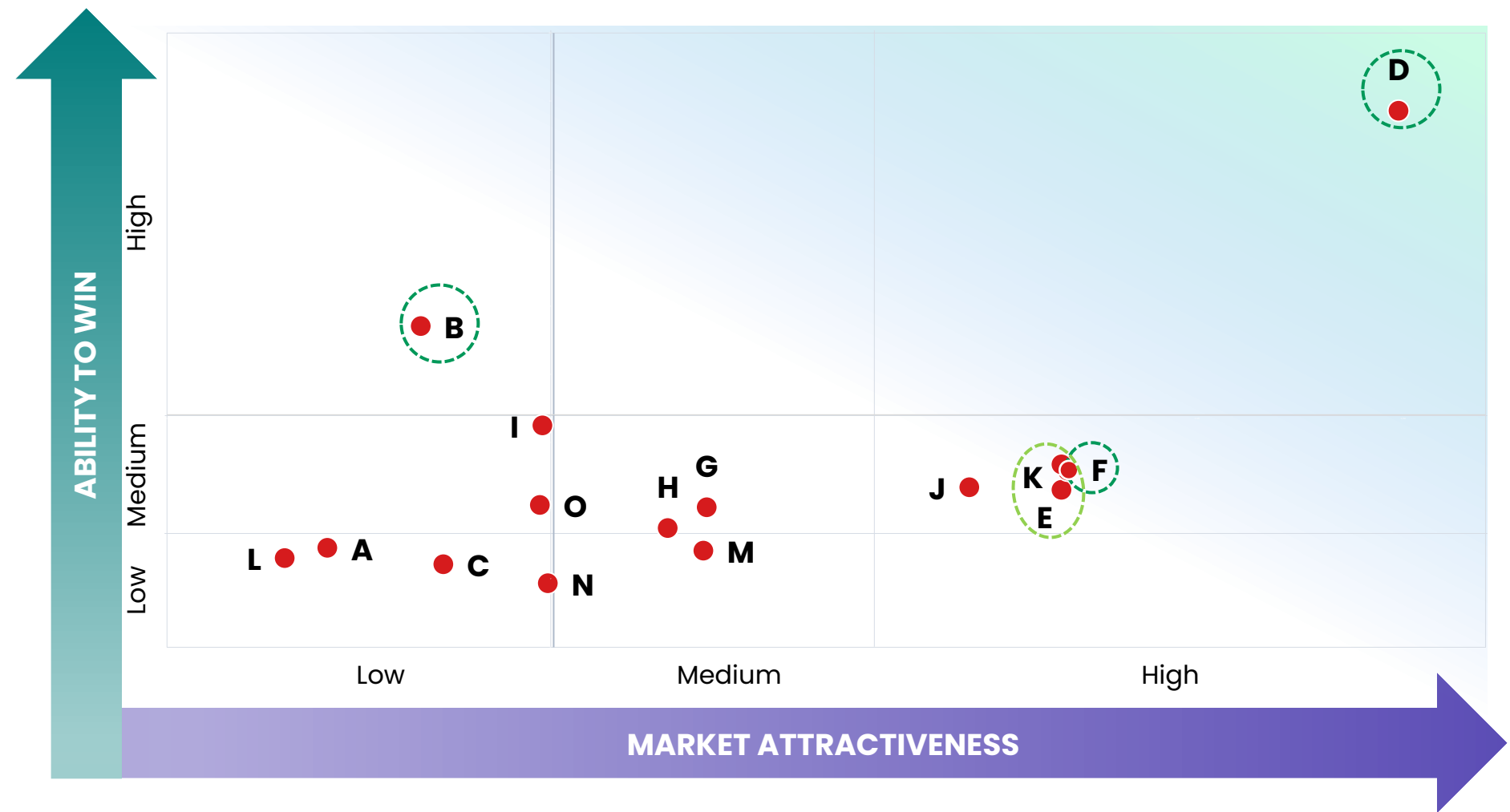
		AGE <= 30				AGE 31-39				AGE > 39						
		KIDS		NO KIDS		NO KIDS		KIDS		KIDS		NO KIDS				
		INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn			
Group 1 Traveller	Other Cities	E 10.3%	F 7.1%	G 6.3%			J 9.1%	K 5.2%	N 6.7%	L 3.7%	C 5.2%					
	Metros and Tier1 Cities			H 7.6%	I 4.4%	H			O 5.0%	M 12.2%						
Group 2 Traveller	Metros and Tier1 Cities			A 4.4%					J 9.1%	K 5.2%			O 5.0%	M 12.2%	B 4.6%	
	Other Cities												N 6.7%	L 3.7%		
Group 3 Traveller	Metros and Tier1 Cities			H 7.6%	I 4.4%	H	D 8.1%				B 4.6%					
	Other Cities			G 6.3%												

Note: Percentages represent the share of travellers in the segment as a proportion of the total market size | mn refers annual household income in millions



PRIORITISATION MATRIX

Segments were prioritised using scores for South Africa’s ability to win (the propensity of each segment to visit South Africa) and market attractiveness (the segment’s contribution to total revenue)



Segments	Share of Segments	Segment Volume (in '000)
Segment A	4.4%	374
Segment B	4.6%	393
Segment C	5.2%	444
Segment D	8.1%	691
Segment E	10.3%	877
Segment F	7.1%	606
Segment G	6.3%	533
Segment H	7.6%	648
Segment I	4.4%	370
Segment J	9.1%	774
Segment K	5.2%	444
Segment L	3.7%	313
Segment M	12.2%	1039
Segment N	6.7%	565
Segment O	5.0%	424



PRIORITISED SEGMENTS

Segments B, D, F, and K, along with potential Segment E, were identified as priority segments, accounting for 35% of long-haul travellers and representing a target market size of 3.0 million

		AGE <= 30				AGE 31-39				AGE > 39						
		KIDS		NO KIDS		NO KIDS		KIDS		KIDS		NO KIDS				
		INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn			
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	Other Cities														N	L
Group 3 Traveller	Metros and Tier1 Cities			H	I	H	D 8.1%				B 4.6%					
	Other Cities			G												



COMPARISON WITH EXISTING SEGMENTS

EXISTING SEGMENTATION FRAME

		AGE <= 30				AGE 31-39				AGE > 39			
		KIDS		NO KIDS		NO KIDS		KIDS		KIDS		NO KIDS	
		High Income	Very High Income	High Income	Very High Income	High Income	Very High Income	High Income	Very High Income	High Income	Very High Income	High Income	Very High Income
Traditional Traveller	Other Metros and Cities	A		D		G		L		N		G	
	Super Metros	B		E		H		J		M		O	
Exotic Traveller	Other Metros and Cities												
Worldly Traveller	Super Metros	C 3.7% Young Family Adventurers		F 8% Social Explorers				I 11.3% Seasoned Status Seekers		K		I Seasoned Status Seekers	
	Other Metros and Cities												

NEW SEGMENTATION FRAME

		AGE <= 30				AGE 31-39				AGE > 39				
		KIDS		NO KIDS		NO KIDS		KIDS		KIDS		NO KIDS		
		INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	> INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	INR 1.7 mn – INR 4.3 mn	> INR 4.3 mn	
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Group 2 Traveller	Metros and Tier1 Cities			A 4.4%										B 4.6%
	Other Cities													
Group 3 Traveller	Metros and Tier1 Cities			H	I	H	D 8.1%							
	Other Cities			G										

C

Segment C HAS EVOLVED to include Group 1 and Group 2 Travellers (**New Segment F**)

F

Share of existing **Segment F HAS SHRUNK** to 2% from 8% in 2012, indicating limited growth potential

I

Segment I HAS EVOLVED—from being income-driven and composed of worldly travellers to being primarily influenced by family status, corresponding to the **new Segment D**

SEGMENT DEFINITIONS



VARIABLES	SEGMENT B	SEGMENT D	SEGMENT E	SEGMENT F	SEGMENT K
 SEGMENT NAME	SEASONED EXPLORERS	FAMILY ADVENTURERS	ASPIRATIONAL EXPLORERS	SCENIC ADVENTURERS	JETSETTERS
 Age	More than 39 years	More than 30 years	Less than or equal to 30 years	Less than or equal to 30 years	31-39 years
 Family Situation	No Dependent Kids	Have Dependent Kids	Have Dependent Kids	Have Dependent Kids	Have Dependent Kids
 Annual Household Income	More than INR 1.7 mn	More than INR 1.7 mn	INR 1.7 mn – INR 4.3 mn	More than INR 4.3 mn	More than INR 4.3 mn
 Destination(s) Travelled in the Last 2 Years	Group 2 Traveller OR Group 3 Traveller	Group 3 Traveller	Group 1 Traveller OR Group 2 Traveller OR Group 3 Traveller	Group 1 Traveller OR Group 2 Traveller OR Group 3 Traveller	Group 1 Traveller OR Group 2 Traveller

Group 1 Traveller

Recently only visited North America, Europe, Australia or New Zealand

Group 2 Traveller

Recently only visited Africa, Central or South America

Group 3 Traveller

Recently visited both 'Group 1' and 'Group 2' destinations



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SEGMENT B: SEASONED EXPLORERS
WHO ARE THEY?



MEET PRAVIN

A **52-year-old male**,
residing in a metro city
(Mumbai /Delhi
/Chennai)



MARRIED
and his annual
household income
is ~ **INR 4.19 mn**



SELF-EMPLOYED
in the formal sector

SEGMENT B: SEASONED EXPLORERS WHY DO THEY TRAVEL?



He travels to explore **natural scenic beauty** and **new places**. He also wants to create **memorable experiences, relax**, and have **fun with his family** while **experiencing different cultures and traditions**

Travel Needs



Natural/ Scenic
Beauty



Explore New
Places



Memorable
Experience



Family Time



Experience
Different Cultures



Escapism/
Relaxation

“ WHAT OTHER SEASONED EXPLORERS HAVE TO SAY? ”

“Travelling is not only about visiting places. It’s about experiencing the heart and soul: its culture, food, and traditions that make every journey unforgettable. Share local customs, rituals, and cultural gems.”

“I believe traveling to be the best experience there is that money can buy. People are visiting different places, they are exploring new cultures, trying out new cuisines, making memories.”

WHAT IS THEIR BEHAVIOUR?

TRAVEL COMPANION AND PURPOSE

He intentionally **plans separate trips with** his **family, friends,** and his **partner**, selecting destinations based on the occasion. For him travel is about **unwinding, fully enjoying the moment, and creating joyful, lasting memories**

“

Holiday becomes more than just a break — it's where family comes together, reconnects, and creates memories that last.



WHAT IS THEIR BEHAVIOUR?

EXPERIENCES SOUGHT

He **prioritises travel over luxury goods** and **spends on experiences** that help him and his **family learn and grow**. Exploring **local cuisine** is non-negotiable, and **culturally significant places** shape his itineraries. He also values **experiences that support local communities** and help **preserve culture**

“

Luxury things fade, but travel gives you memories that last a lifetime. I'd always choose experiences over stuff!



WHAT IS THEIR BEHAVIOUR?

TRAVEL PLANNING AND BOOKING

He uses **AI tools** to stay informed and in control while travelling, as he enjoys **planning** his trips. He trusts established **hotel brands** over **reviews**. When travelling with family, he also relies on **travel agents** for **reassurance, visa management, and bookings**

“

I did not use ChatGPT just to “plan an itinerary”. It ended up helping me in dozens of small, very practical ways throughout the trip. Not in a futuristic or gimmicky way, but in a “this actually, reduced my stress in real time” way.



WHERE AND WITH WHOM DO THEY TRAVEL?



Travel Frequency, Destinations & Travel Companions



Pravin takes **one long-haul trip each year** and has recently travelled to prominent destination in Africa (South Africa)



He usually **travels with his spouse** and plans his trip in consultation with her

SEGMENT B: SEASONED EXPLORERS
WHEN DO THEY TRAVEL?



Preferred Travel Months & Travel Motivators



He plans his trip around **August** or **October** for **weather conditions** in his country, with October aligning with the **holiday season**, while August is chosen for **cost-effective travel and shopping festivals**



For him, **cost-effective tour packages, prices similar to domestic trips**, and **favourable weather** would motivate him to travel outside his preferred months

WHERE AND WHAT INFORMATION DO THEY SEEK?



Travel Information Sources & Information Sought

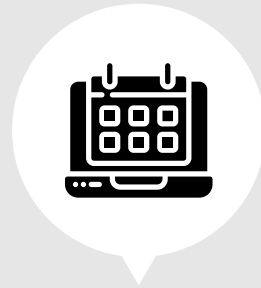


He primarily gathers information from **traveller reviews** and **social networking sites** and seeks **expert recommendations**

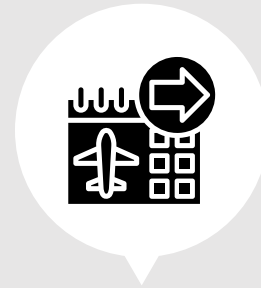


He mainly looks for information on **major tourist attractions**, the **availability of Indian food**, and **special packages or offers**

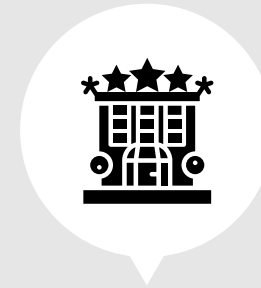
SEGMENT B: SEASONED EXPLORERS HOW DO THEY TRAVEL?



Pravin decides his destination at least 2 months in advance and makes bookings 1-4 weeks before departure. He typically stays at the destination for **8 days** and spends **~ INR 372K*** per trip



He prefers booking **all-inclusive packages** that cover airfare, accommodation, meals, sightseeing, and local transportation



He usually stays in **3-5-star hotels**, choosing them based on **official accommodation ratings and user reviews**



He relies on **transport arranged by tour operator/ travel agent**, as well as **city/ inter-city local transport**, to get around

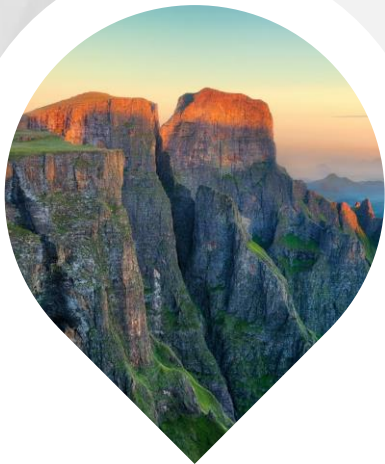
Note: Amount spent on trip is in thousands (K)

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

WHAT DO THEY ASSOCIATE WITH SOUTH AFRICA?



He primarily associates South Africa with its **natural scenic beauty, vibrant nightlife, the iconic Cape of Good Hope, good cuisine, and value for money experiences**. For him, South Africa is a blend of stunning landscapes and lively experiences



Natural Scenic
Beauty



Nightlife



Cape of Good Hope



Good Cuisine



Value for Money
Tourism Destination

WHAT MEDIA DO THEY ENGAGE WITH MOST?



Pravin primarily watches **TV** across formats and actively engages with **social networking**, **user-generated video platforms**, and **paid streaming services**



TV
(Broadcast TV, On-demand TV, Online subscription TV)



Social Networking & Other Websites



ChatGPT

**User Generated Video
Websites/ Apps**



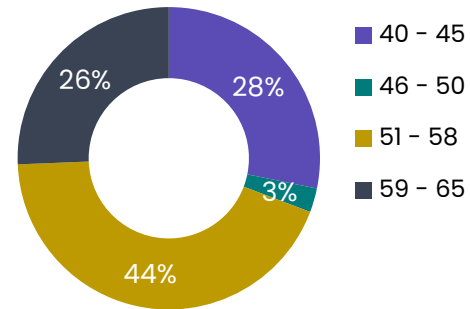
**Downloadable Paid TV/Film/
Music Content**



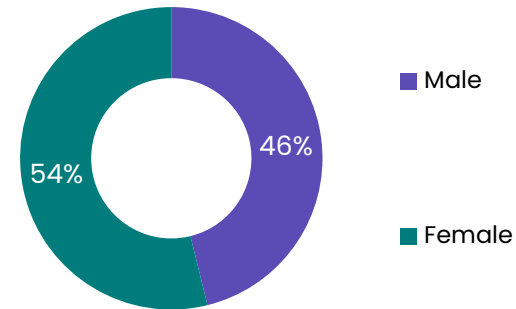
SEGMENT B: SEASONED EXPLORERS DETAILED PROFILE



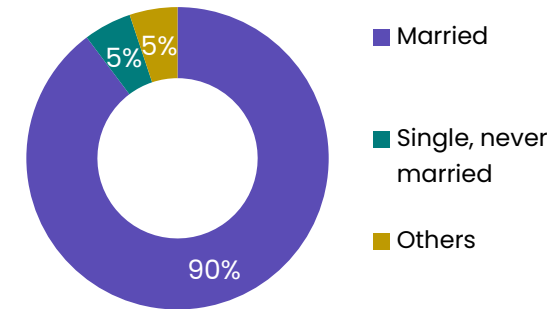
AGE



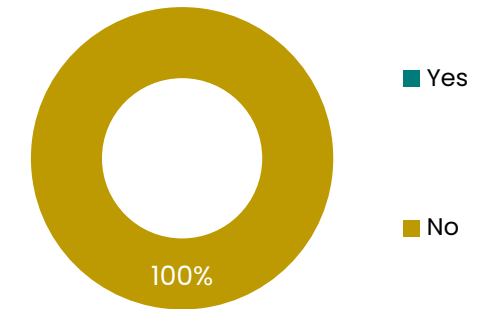
GENDER



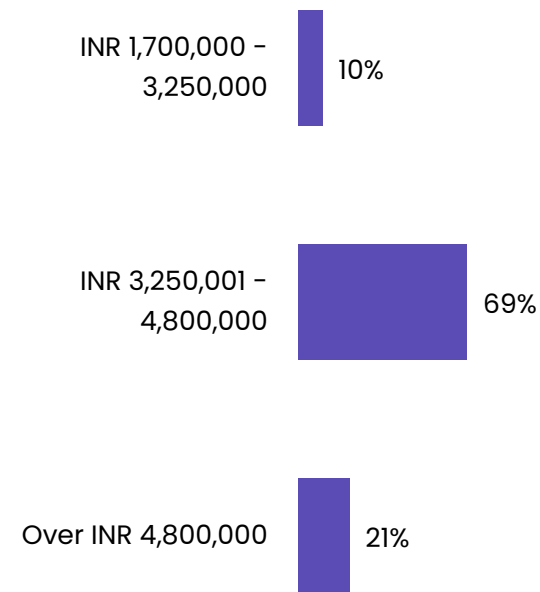
MARITAL STATUS



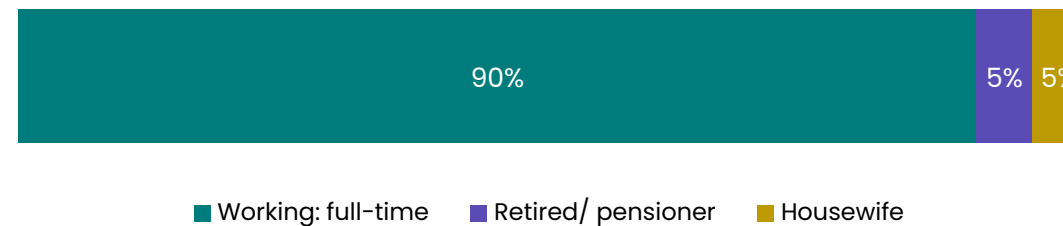
DEPENDENT CHILDREN



ANNUAL HOUSEHOLD INCOME



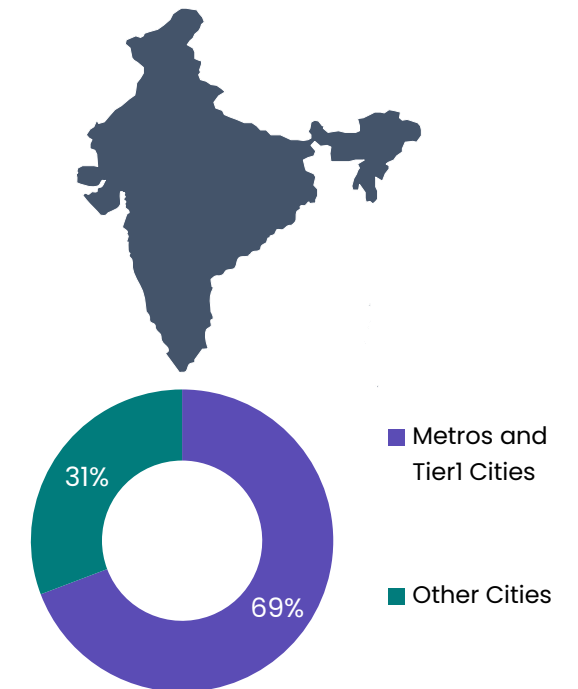
EMPLOYMENT STATUS



CURRENT ROLE/ DESIGNATION



CITY OF RESIDENCE



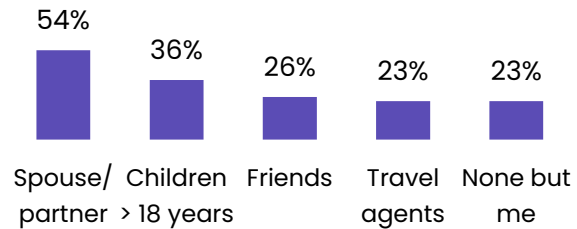
Base (n)= 39

SEGMENT B: SEASONED EXPLORERS

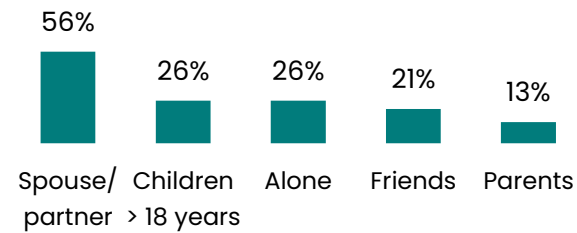
TRAVEL SPECIFICS



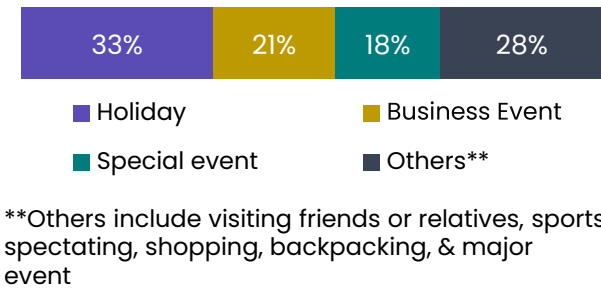
TRAVEL PLANNERS



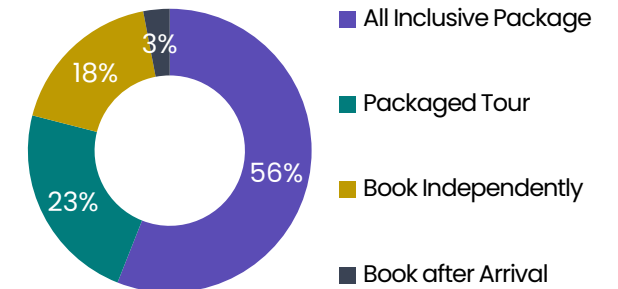
TRAVEL COMPANION



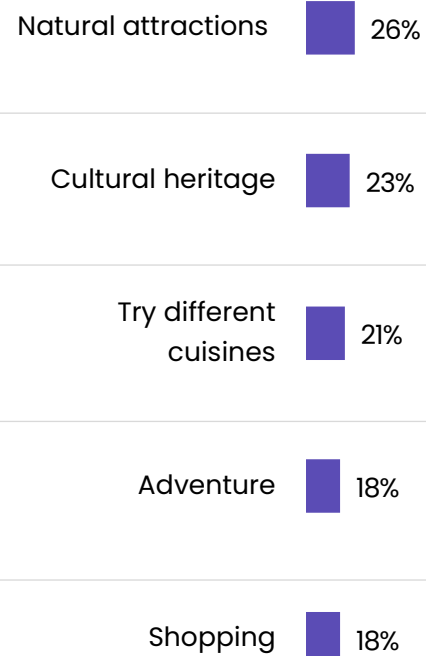
PRIMARY PURPOSE OF VISIT



BOOKING PREFERENCE



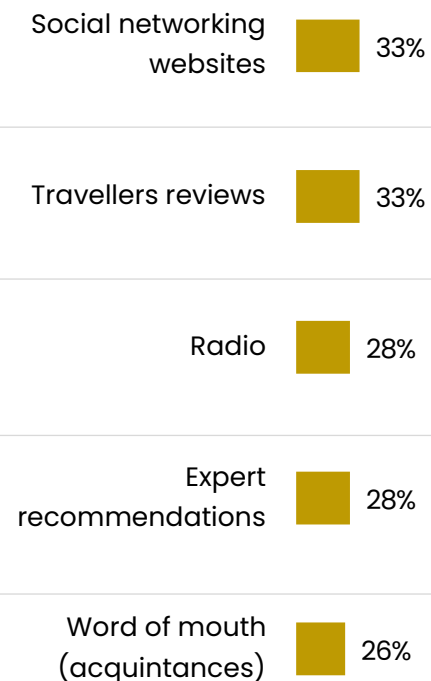
ACTIVITIES SOUGHT



DESIRABLE FACTORS



SOURCES OF INFORMATION#



FREQUENCY OF ANNUAL TRAVEL



~ 1.4 Trips

AVERAGE TRIP DURATION



~ 8 Days

AVERAGE SPEND*



~ INR 372,143

Base (n) = 39

Note: #Sources of Information includes primary and secondary sources

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

SEGMENT B: SEASONED EXPLORERS

TRAVEL ATTITUDE & BEHAVIOUR



WHAT THEY LOOK FOR	SEASONED EXPLORERS (Top 2 Box%)
I intentionally plan separate holidays to balance family time, friendships, and couple time	82%
I prefer spending on experiences that help me and or my family learn and grow	82%
Experiencing local cuisine is a key reason I travel	79%
I prefer traveling over buying luxury goods	79%
I travel to relax and have fun while truly experiencing the essence of a place	79%
When I travel with my family, I prefer to book through travel agents for assurance purposes	79%
I like to explore a destination at my own pace rather than rushing through it	77%
I travel to create joyful, lasting memories	77%
The brand name of the hotel or resort encourages me to book more than ratings and reviews	77%
The occasion influences my choice of destination	77%

WHAT THEY'RE LESS INTERESTED IN	SEASONED EXPLORERS (Top 2 Box%)
I like to have a mix of relaxing and thrilling experiences within a day out at a destination	56%
Travel costs do not influence my destination choice if the experience is new, unique and sought after	56%
I want to experience local life, not just see tourist spots	59%
I prefer to travel during off-peak seasons to avoid crowds	59%
I often extend business/ official trips to include personal leisure time to make the most of the destination while I am there	59%
Saving money on my trip allows me to upgrade other parts of the experience that matter more to me	59%
TV shows, movies or documentaries often inspire me to visit new places	64%
I prefer relaxed adventure activities like hiking, boat cruise over more high adrenaline adventure such as bungee jumping or shark cage diving	64%
I actively seek Indian food/ meals while travelling internationally	64%
I prefer not to visit the same destination more than once	64%

Base (n) = 39

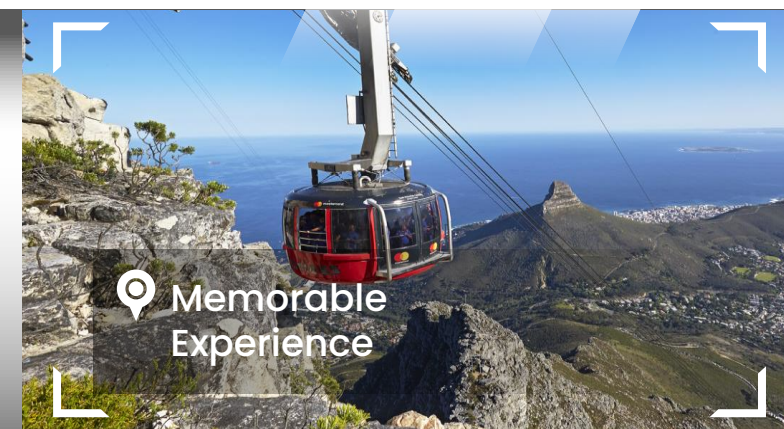
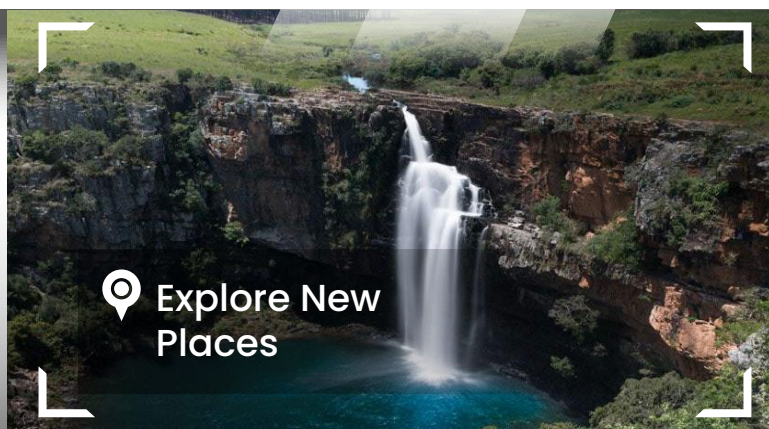
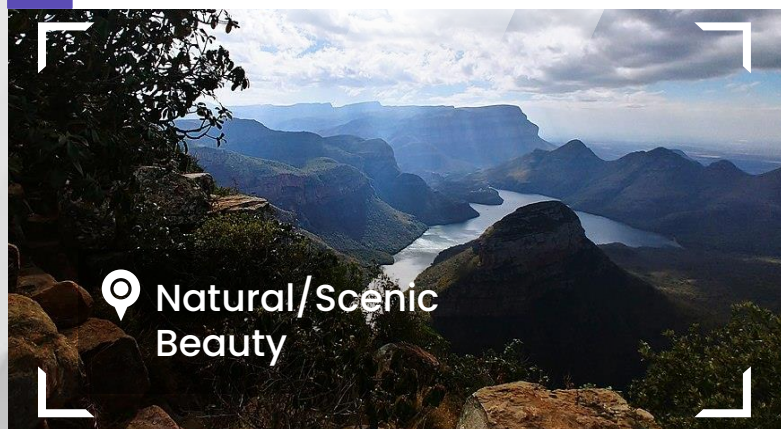
WHAT SHOULD BE THE FOCUS OF OUR MESSAGING?

SEGMENT B: SEASONED EXPLORERS

INSIGHT



Seasoned Explorers look for destinations that offer **natural beauty**, provide opportunities to **explore new places**, and help create **memorable experiences**



ACTION



- ✓ Position South Africa as a destination rich in natural beauty by **showcasing its iconic scenic landscapes**
- ✓ Promote **exploration-led experiences** that encourage travellers to visit different regions in South Africa
- ✓ Emphasise memorable, once-in-a-lifetime moments by **highlighting experiences unique to South Africa**

WHEN SHOULD WE BE ON-AIR?

SEGMENT B: SEASONED EXPLORERS

INSIGHT



Travellers typically plan their trips **at least 2 months in advance**, with **August and October** being peak travel months



ACTION



- ✓ **Activate marketing efforts from June–September**, ensuring strong visibility and increased consideration

WHAT SHOULD BE OUR OPTIMAL MEDIA MIX?

SEGMENT B: SEASONED EXPLORERS

INSIGHT



Travellers engage with TV and social networking sites for their everyday entertainment



ACTION



✔ To maximise reach and engagement, prioritise advertising on

TV PLATFORMS



SOCIAL & SEARCH PLATFORMS



WHAT SHOULD OUR TRADE PARTNERS PROMOTE?

SEGMENT B: SEASONED EXPLORERS

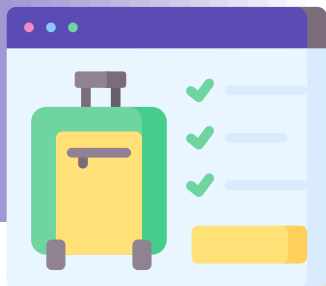
INSIGHT



All-inclusive travel package options are sought by travellers as they provide cost transparency and a more structured approach to trip planning



ACTION



- ✔ **Promote all-in-one solutions through trusted trade partners** that reduce planning complexity, offering travellers a seamless, hassle-free experience with transparent pricing

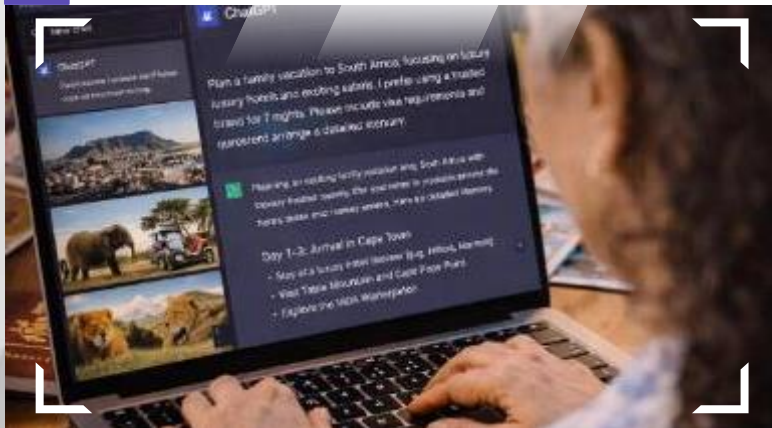
WHAT PLATFORMS AND CONTENT AREAS MATTER MOST?

SEGMENT B: SEASONED EXPLORERS

INSIGHT



Travel planning is influenced by peer feedback and social validation, with **travellers relying on reviews and social media platforms** alongside expert opinions, primarily seeking information on major tourist attractions, the availability of Indian food, and special packages or offers



ACTION



- ✓ Strengthen **presence on travel review and booking platforms** such as Agoda, Booking.com, and MakeMyTrip
- ✓ **Amplify visibility** on social networking sites like Instagram, Facebook, and WhatsApp **through reviews, testimonials, and expert-led content**



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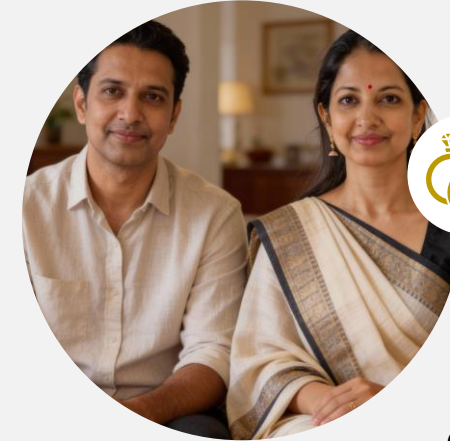
Cross-segment
Analysis

SEGMENT D: FAMILY ADVENTURERS
WHO ARE THEY?



MEET KAVITA

A **42-year-old female**,
residing in a metro city
(Mumbai /Delhi
/Kolkata)



MARRIED
and his annual
household income
is ~ **INR 4.42 mn**



WORKS FULL-TIME
as a **director**

SEGMENT D: FAMILY ADVENTURERS WHY DO THEY TRAVEL?



She seeks a mix of **adventure** and **relaxation** in her trips. She values spending **quality time with her family while exploring natural scenic beauty and new places**, showing a preference for destinations that combine excitement with escapism creating meaningful shared moments

Travel Needs



Adventure



Escapism/
Relaxation



Family Time



Natural/ Scenic
Beauty



Explore New
Places

“ WHAT OTHER FAMILY ADVENTURERS HAVE TO SAY? ”

“The first trigger is I need a holiday. The second trigger is who is going along with me. With friends or children, I would gravitate towards beach destinations. With my husband, probably I would do a city break. We try to do new places every time, but with kids and friends, it's mostly about what is convenient.”

“Travel truly becomes an adventure when we step out of our comfort zone and embrace the unknown.”

WHAT IS THEIR BEHAVIOUR?

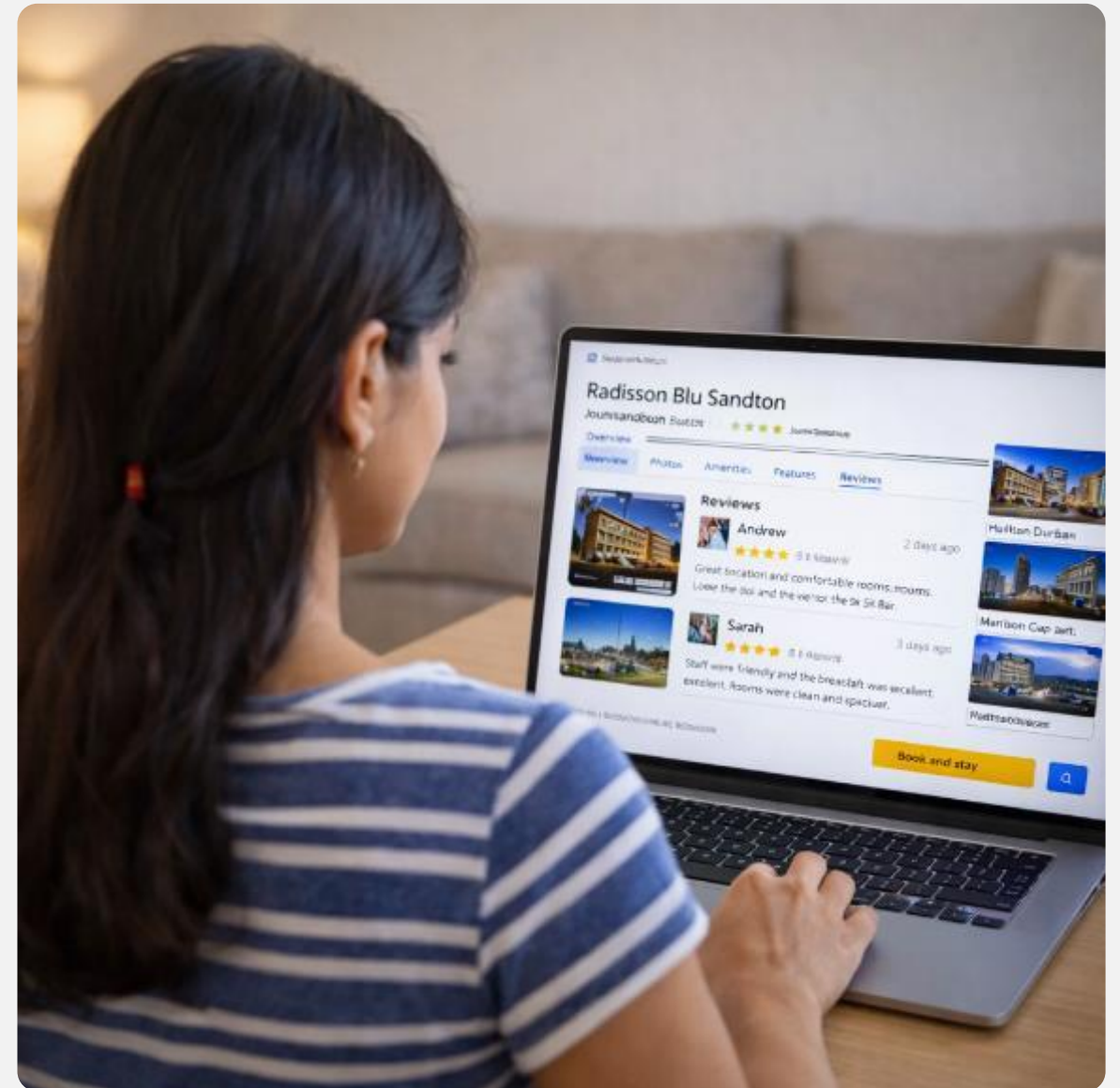
TRAVEL PREFERENCES

She prefers destinations with **visa-free access or visa-on-arrival** and chooses them based on the occasion and her travel companions. **Branded hotels** influence her accommodation choices more than reviews, and she **prioritises direct flights** for hassle-free travel experience

“

I choose mine based on location and star rating. I read the written reviews, . I prefer to look at customer provided images on Trip Advisor and Instagram to get a good idea of what the hotel and room will look like.

”



WHAT IS THEIR BEHAVIOUR?

EXPERIENCES SOUGHT

Creating **lasting memories** is most important to her, and she actively **spends on experiences that help her and her family grow. Culture and history** shape her choices. She prefers **relaxed adventures**, such as **hiking and cruises**, over extreme activities, favouring experiences that are **enriching** rather than exhausting

“

One thing I always believed is that travel broadens our perspective. When we see new places, meet different people, and experience life outside our comfort zone, our minds usually become more open and accepting.

”



WHAT IS THEIR BEHAVIOUR?

INFORMATION SOURCES

Her itineraries are guided by recommendations from **social media platforms** and **travel influencers**. She also draws inspiration **from films and documentaries** and enjoys **sharing photos and experiences** on social media posts. She **plans her trips carefully** to **save money** and **upgrade the experiences** that matter most

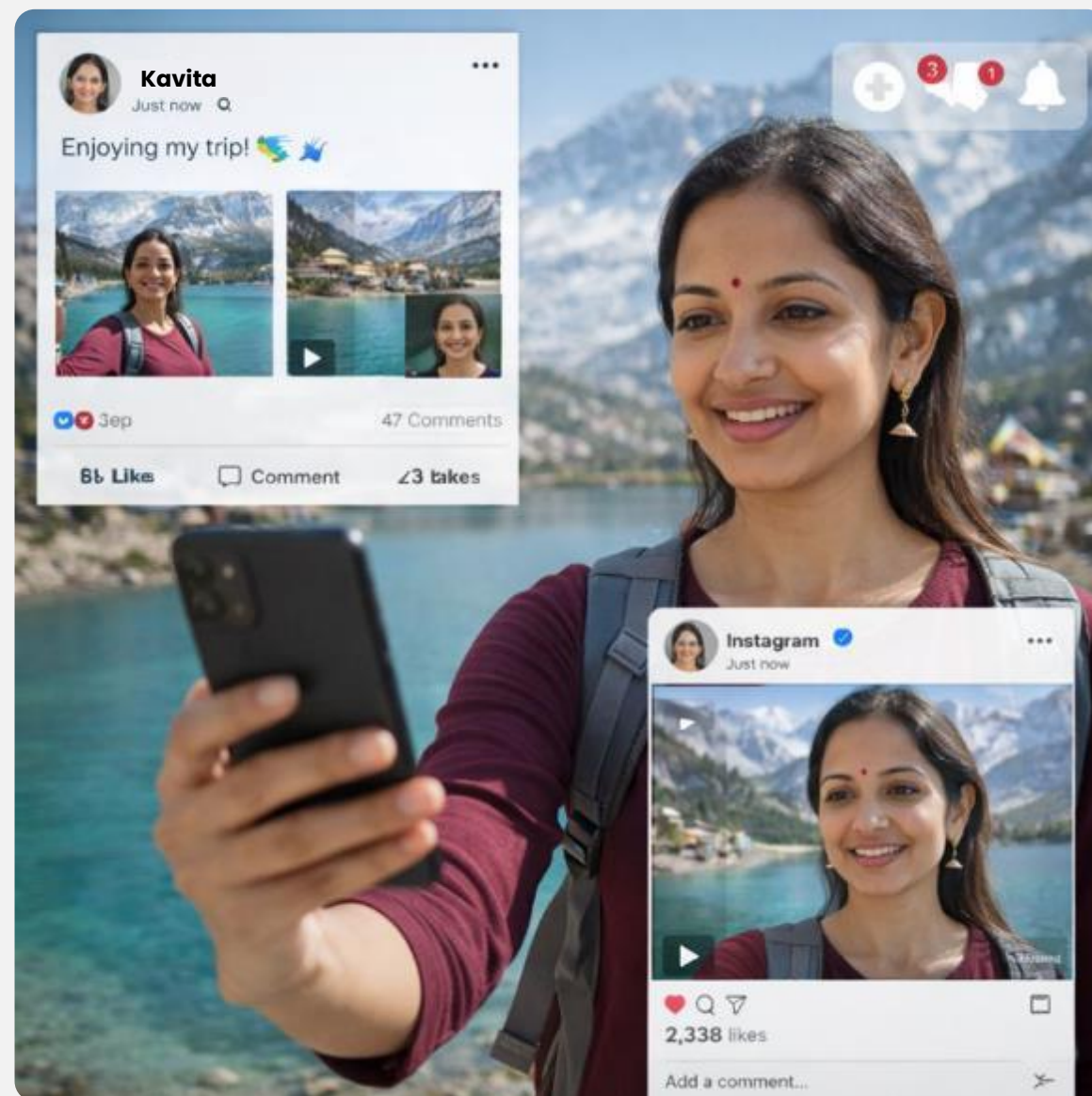
“

I saw place on Instagram and made it part of our trip — took our family there because of it.

”

“XX

The information in this box reflects comments gathered from social media platforms and in-depth interviews conducted in India market.



WHERE AND WITH WHOM DO THEY TRAVEL?



— Travel Frequency, Destinations & Travel Companions



Kavita takes **three long-haul trips each year** and has recently travelled to prominent destinations in Africa (South Africa) and Europe (UK)



She usually **travels with her spouse** or **with her family, including children**, and plans her trips in consultation with her spouse

SEGMENT D: FAMILY ADVENTURERS
WHEN DO THEY TRAVEL?



Preferred Travel Months & Travel Motivators



She plans her trips around **May** due to **fewer financial commitments during that month** and **shopping festivals** at the destination, and in **September** for a **quieter, less-crowded** holiday experience



For her, **cost-effective tour packages** and **family or special events** would encourage her to travel outside her preferred months

WHERE AND WHAT INFORMATION DO THEY SEEK?



Travel Information Sources & Information Sought

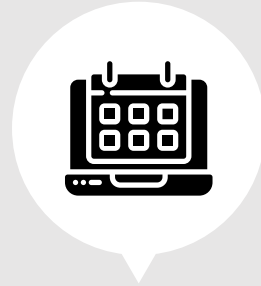


She seeks information through **expert recommendations**, while also looking at **traveller reviews and social networking sites**

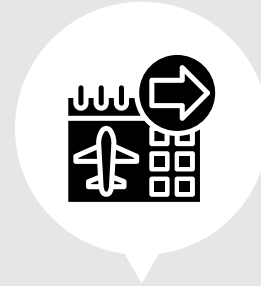


She primarily looks for information on **major travel routes, transport facilities, and local people and culture**

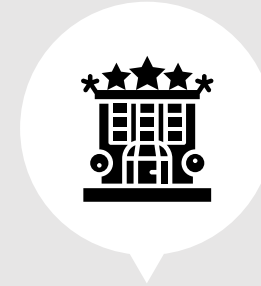
SEGMENT D: FAMILY ADVENTURERS HOW DO THEY TRAVEL?



Kavita **decides her destinations at least 2 months in advance and makes bookings 1-4 weeks** before departure. She typically stays at the destination for **10 days** and spends **~ INR 432K*** per trip



She prefers booking **all-inclusive packages** that include airfare, accommodation, meals, sightseeing, and local transport



She usually stays in **5-star hotels or bed and breakfast accommodations**, depending on who she travels with. She selects stays based on **traveller reviews and official accommodation ratings**



She generally uses **transport arranged by tour operator/ travel agent**, as well as **city/ inter-city local transport**, to get around

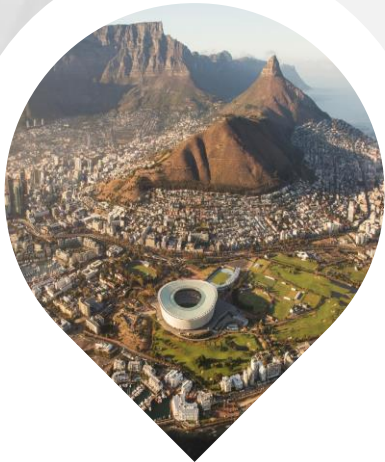
Note: Amount spent on trip is in thousands (K)

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

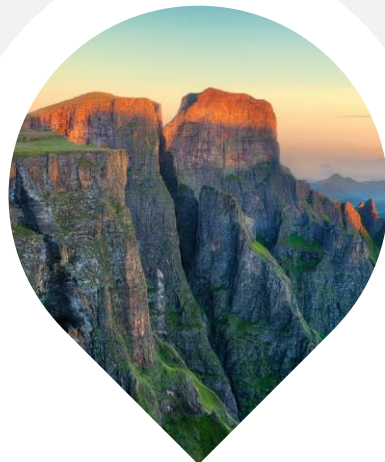
WHAT DO THEY ASSOCIATE WITH SOUTH AFRICA?



She predominantly associates South Africa with **Cape Town, natural scenic beauty, its rich culture and history, and wildlife safaris**



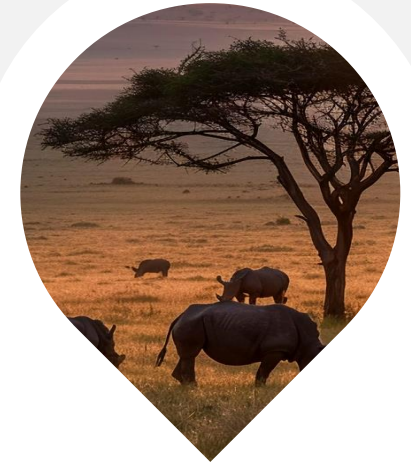
Cape Town



Natural Scenic
Beauty



Culture, Diversity,
History



Wildlife Safaris/
Nature Reserves

WHAT MEDIA DO THEY ENGAGE WITH MOST?



She stays active on **social media**, **subscribes to streaming and music services**, and keeps up with **digital news** and **gaming** for entertainment



Social Networking & Other Websites



ChatGPT

Downloadable Paid TV/Film/
Music Content

Subscription Music Services



Digital Newspaper



Gaming

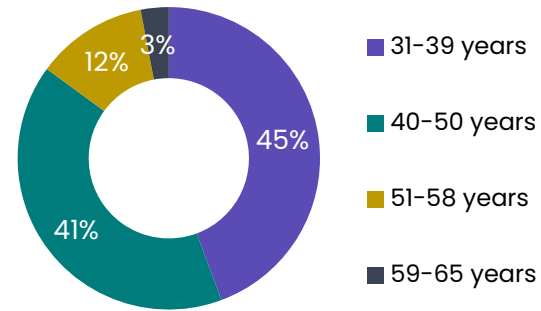
(Console, Mobile, PC or Online)



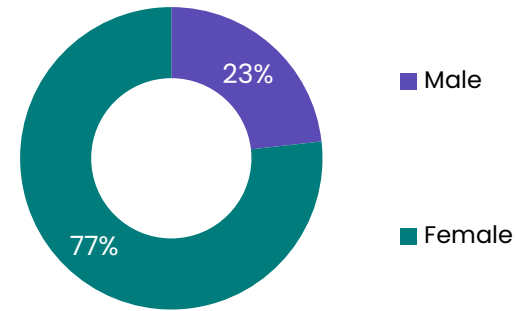
SEGMENT D: FAMILY ADVENTURERS DETAILED PROFILE



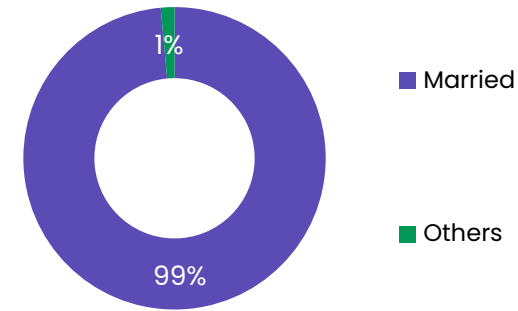
AGE



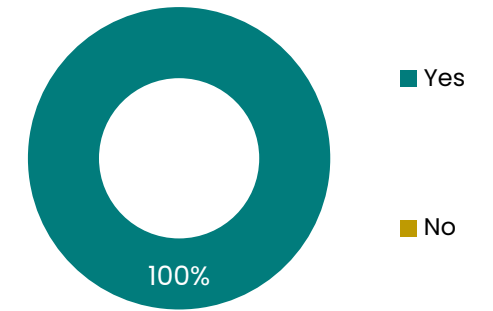
GENDER



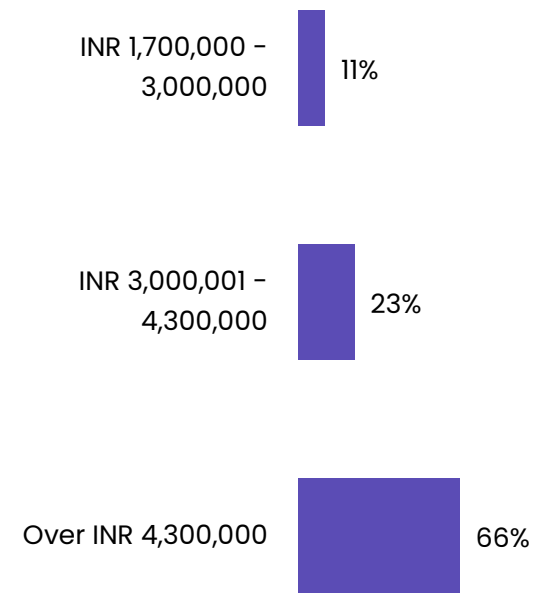
MARITAL STATUS



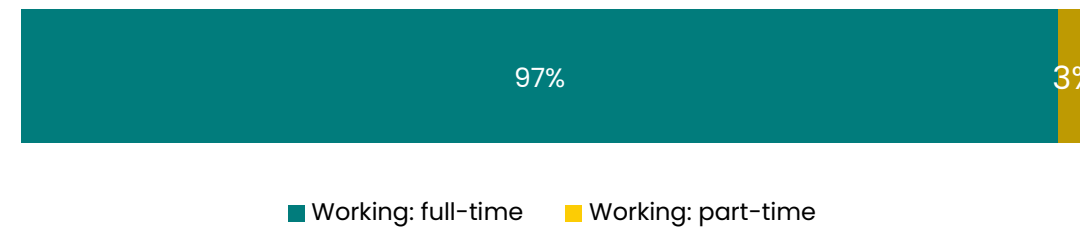
DEPENDENT CHILDREN



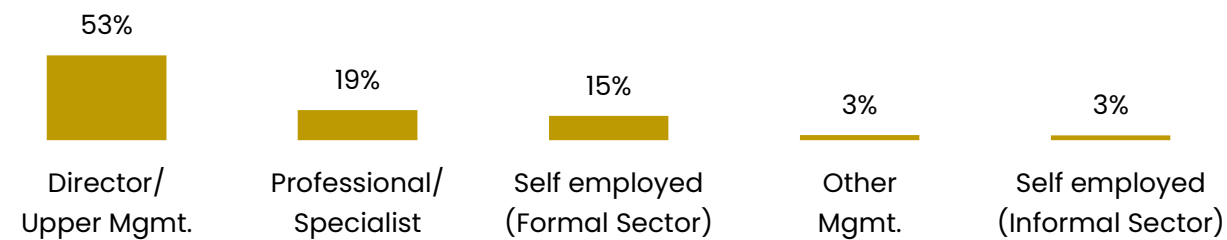
ANNUAL HOUSEHOLD INCOME



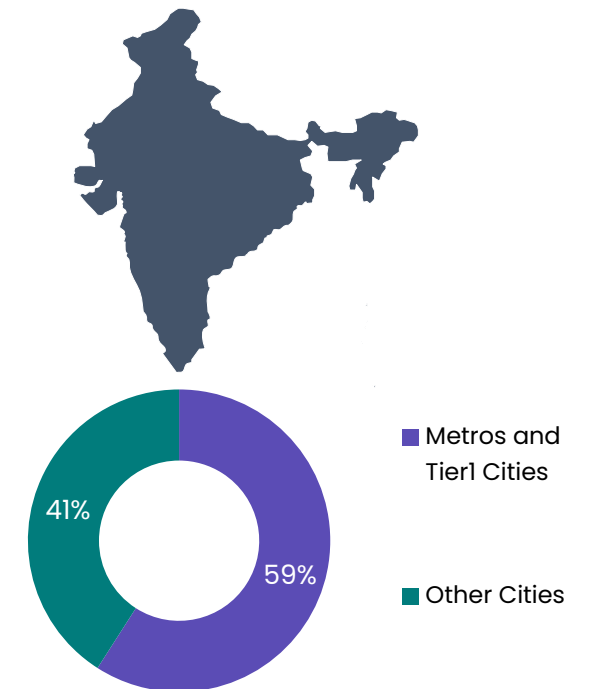
EMPLOYMENT STATUS



CURRENT ROLE/ DESIGNATION



CITY TIER OF RESIDENCE

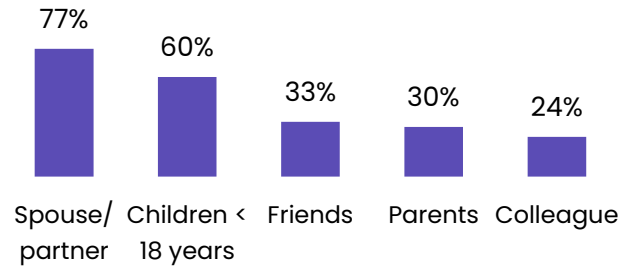


Base (n) = 65

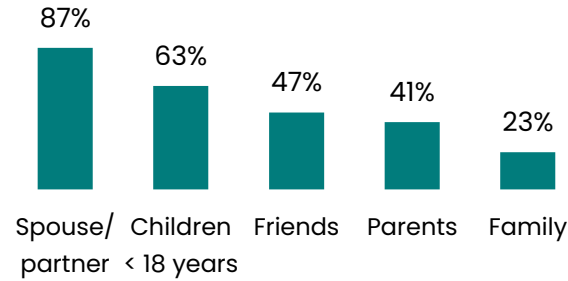
SEGMENT D: FAMILY ADVENTURERS TRAVEL SPECIFICS



TRAVEL PLANNERS



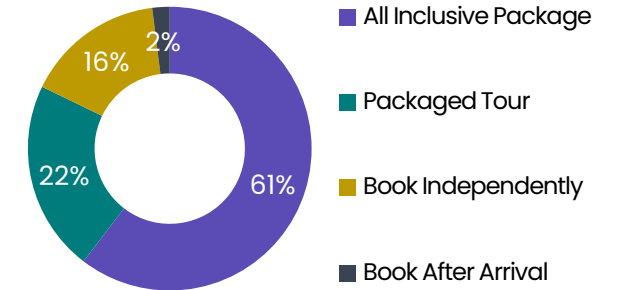
TRAVEL COMPANION



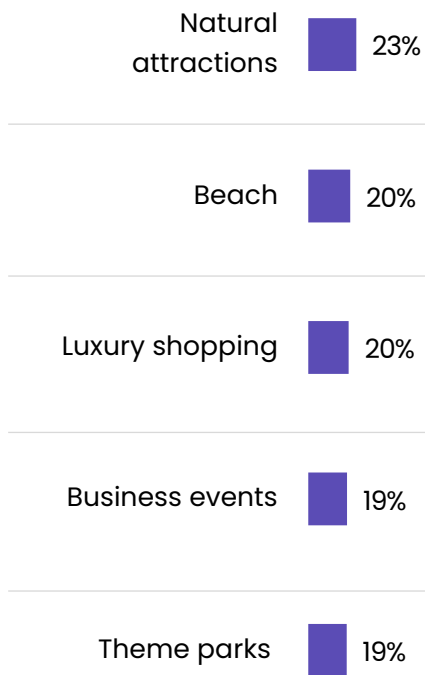
PRIMARY PURPOSE OF VISIT



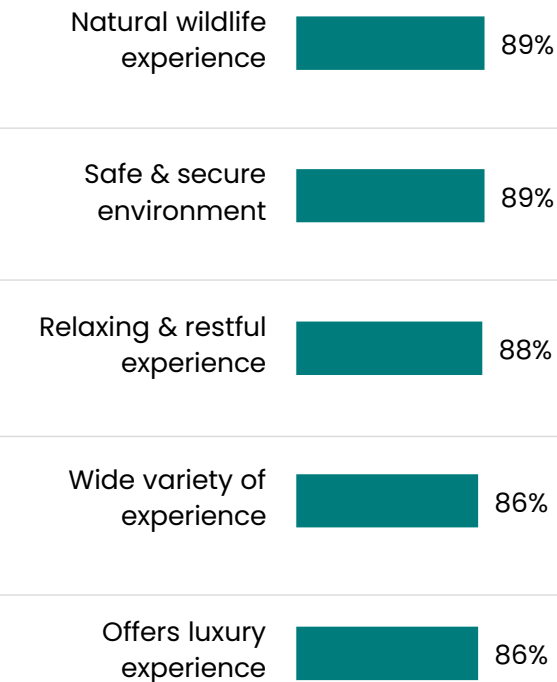
BOOKING PREFERENCE



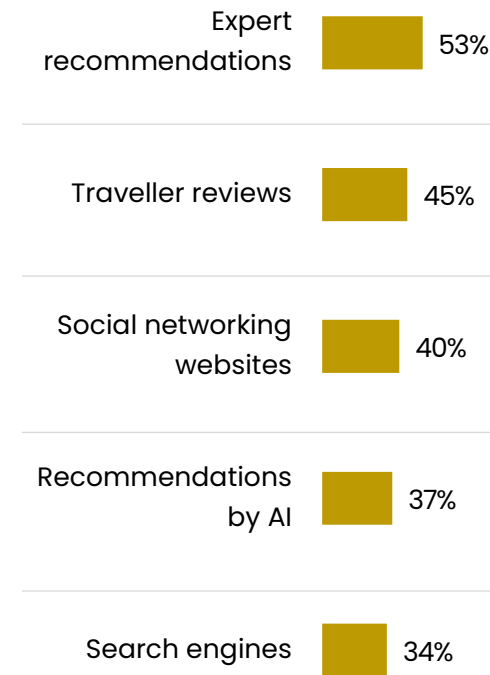
ACTIVITIES SOUGHT



DESIRABLE FACTORS



SOURCES OF INFORMATION#



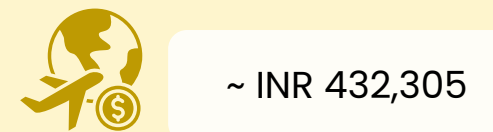
FREQUENCY OF ANNUAL TRAVEL



AVERAGE TRIP DURATION



AVERAGE SPEND*



Base (n) = 65

Note: #Sources of Information includes primary and secondary sources

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

SEGMENT D: FAMILY ADVENTURERS

TRAVEL ATTITUDE & BEHAVIOUR



WHAT THEY LOOK FOR	FAMILY ADVENTURERS (Top 2 Box%)
I am more likely to choose a destination that offers visa-free or visa-on-arrival access	86%
The occasion influences my choice of destination	86%
The brand name of the hotel or resort encourages me to book more than ratings and reviews	85%
I prefer relaxed adventure activities like hiking, boat cruise over more high adrenaline adventure like bungee jumping or shark cage diving	84%
I follow travel influencers on social media to know about interesting destinations	82%
I prefer spending on experiences that help me and or my family learn and grow	82%
I travel to create joyful, lasting memories	82%
Visiting culturally or historically significant landmarks is important to me	82%
Adventure and new experiences are a big reason I travel	80%
I choose destinations and activities based on my travel companions	80%

WHAT THEY'RE LESS INTERESTED IN	FAMILY ADVENTURERS (Top 2 Box%)
I often extend business/ official trips to include personal leisure time to make the most of the destination while I am there	59%
I avoid destinations that are usually overcrowded	63%
I prefer to travel during off-peak seasons when prices are lower	63%
I actively seek Indian food/ meals while travelling internationally	66%
When I'm unsure about a destination, I use a travel agent for planning and booking	67%
When I travel with my family, I prefer to book through travel agents for assurance purposes	68%
I want to experience local life, not just see tourist spots	68%
I prefer to travel during off-peak seasons to avoid crowds	69%
I prefer not to visit the same destination more than once	69%
I do not compromise on my travel experience when I travel internationally	71%

Base (n) = 65

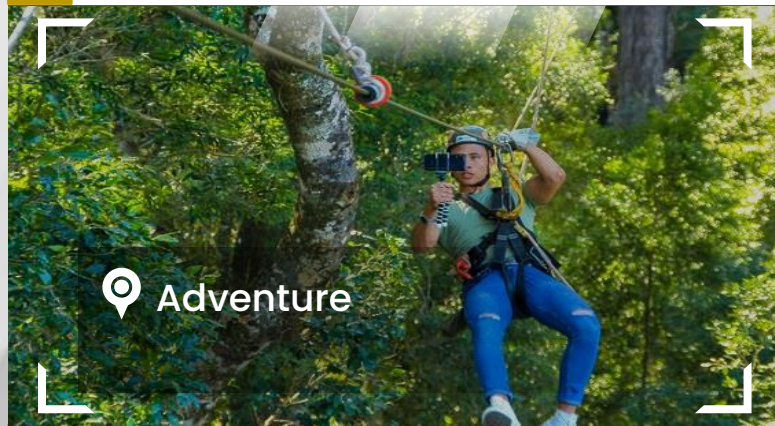
WHAT SHOULD BE THE FOCUS OF OUR MESSAGING?

SEGMENT D: FAMILY ADVENTURERS

INSIGHT



Family Adventurers look for destinations that combine **adventure** with opportunities for **quality family time**, while also providing **spaces to relax and disconnect from everyday routines**



ACTION

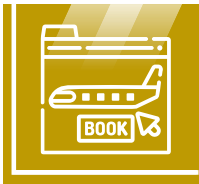


- ✓ Position South Africa as a versatile travel destination, **highlighting adventure-led experiences alongside serene getaways** that are perfect for relaxing and creating memorable family experiences

WHEN SHOULD WE BE ON-AIR?

SEGMENT D: FAMILY ADVENTURERS

INSIGHT



Destinations are finalised **at least two months in advance**, with **May and September** being peak travel months



ACTION



- ✔ Promote South Africa as a travel destination during **March–April and July–August**, maintaining strong visibility across multiple platforms to drive higher consideration

WHAT SHOULD BE OUR OPTIMAL MEDIA MIX?

SEGMENT D: FAMILY ADVENTURERS

INSIGHT



Travellers actively engage with **social media platforms** while also accessing **premium, downloadable TV, film, and music content through subscription-based services**



ACTION



✓ To **maximise reach and engagement, prioritise advertising on**

SOCIAL & SEARCH
PLATFORMS



PREMIUM
VIDEO & AUDIO SERVICES

amazon

SUBSCRIPTION MUSIC
SERVICE

 Google Podcasts

 Spotify

WHAT SHOULD OUR TRADE PARTNERS PROMOTE?

SEGMENT D: FAMILY ADVENTURERS



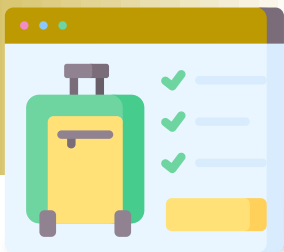
INSIGHT



Travellers prefer **all-inclusive packages** that simplify trip planning and provide a seamless, end-to-end travel experience



ACTION



- ✔ Promote **all-inclusive offerings through trusted travel trade partners**, highlighting a convenient, one-stop solution that reduces planning complexity and ensures transparency

WHAT PLATFORMS AND CONTENT AREAS MATTER MOST?

SEGMENT D: FAMILY ADVENTURERS

INSIGHT



Travellers rely on **expert recommendations**, **traveller reviews**, and **social networking platforms** for information, seeking details on **travel routes**, **transport options**, and insights into **local people and culture**



ACTION



- ✓ **Partner with experts** and encourage positive recommendations about South Africa. Create **curated guides** on platforms such as Tripadvisor and Yatra to raise awareness of travel routes, transport options, and South Africa's cultural heritage
- ✓ **Leverage traveller reviews and detailed listings on Agoda and Booking.com** to build traveller confidence



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SEGMENT E: ASPIRATIONAL EXPLORERS
WHO ARE THEY?



MEET RAHUL

A **27-year-old male**,
residing in a metro and
tier 1 city (Mumbai /
Delhi / Bengaluru)



MARRIED
and his annual
household income
is ~ **INR 2.86 mn**



WORKS FULL-TIME
in the **upper**
management

SEGMENT E: ASPIRATIONAL EXPLORERS WHY DO THEY TRAVEL?



His travel needs are primarily driven by creating **memorable experiences** and spending **quality time with family**, while enjoying **fun activities**, **natural scenic beauty**, and **good shopping experiences**

Travel Needs



Memorable
Experience



Family Time



Fun



Natural/ Scenic
Beauty



Shopping
Experience

“ WHAT OTHER ASPIRATIONAL EXPLORERS HAVE TO SAY? ”

“The enchanting landscapes, the elevation changes. Hugely rewarding upon climbing and conquering each passes along the route.”

“Went with my family for a 10-day trip after so long. The people were so good and the fun we had just wanted us to stay there for more. Plus, we all had such a good escape from work and got time to spend together Ultimate fun”

WHAT IS THEIR BEHAVIOUR?

MEANING AND PURPOSE OF TRAVEL

For him, success is measured by experiences had, not possessions. He prefers **spending on travel** over luxury goods, choosing trips that **help him and his family grow and create lasting joy and memories.** Travel is not a break from life; it is how he enriches it

“

Travelling makes you richer in experiences, memories, and understanding. Travel teaches you things nothing else can. It opens your mind, makes your heart softer, helps you understand life in a bigger way, and changes the way you see everything.



WHAT IS THEIR BEHAVIOUR?

TRAVEL MINDSET

He **doesn't rush through** destinations — he takes time to truly experience them. Whether **exploring local life, heritage landmarks, or cuisine**, he **seeks an emotional connection**, not just sightseeing. He plans his trips based on the people he travels with, **balancing family, friendships, and couple time**. For him, **travel deepens relationships** as much as it **broadens perspective**

“

Travel isn't just about going places — it's about feeling something deeper. The joy of discovery, the wonder of culture, and the connections you build along the way are what truly matter.



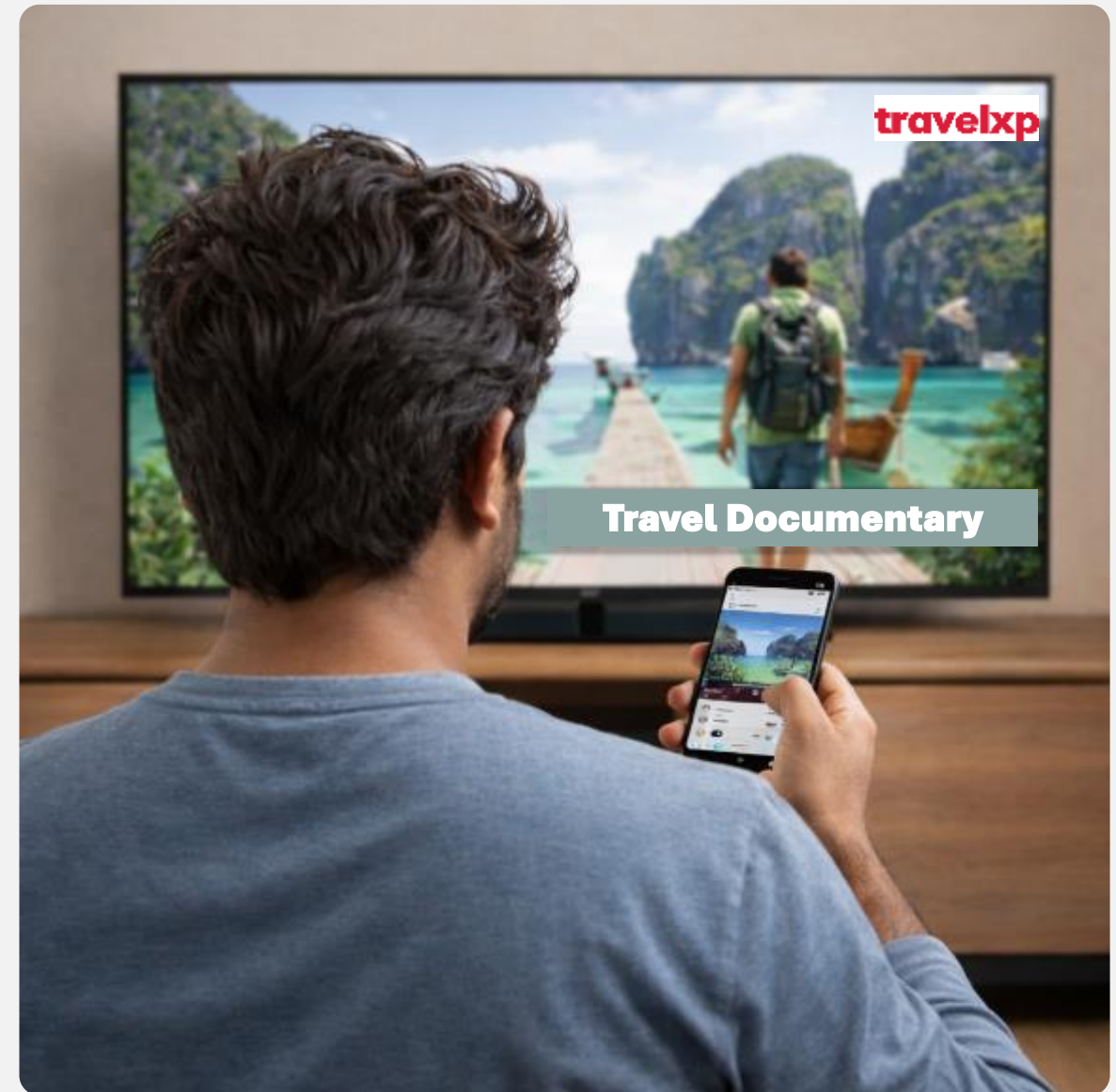
WHAT IS THEIR BEHAVIOUR?

INFORMATION SOURCES AND BOOKING PREFERENCE

His travel inspiration is shaped by **movies, documentaries, and digital content**. He **actively captures and shares his journeys** through **photos and posts, values trusted accommodations** and **direct flights**. His **budgeting is strategic**, not restrictive, allowing him to enhance the experiences that truly matter

“

Movies not only entertain me but inspire me through exceptional locations and scenic views, often making me yearn to plan a long trip to those places.



WHERE AND WITH WHOM DO THEY TRAVEL?



— Travel Frequency, Destinations & Travel Companions



Rahul takes **two long-haul trips each year** and has recently travelled to prominent destinations in Europe (Switzerland, UK) and North America (USA)



He typically **travels with his spouse**, sometimes with friends and family (including children), and plans trips together with his spouse

Preferred Travel Months & Travel Motivators



He plans his trips around **December and January**, as both months offer **favourable weather conditions** and coincide with the **holiday season**



For him, **cost-effective tour packages, favourable weather, travel costs comparable to domestic trips, and special events** would motivate him to travel outside his preferred months

WHERE AND WHAT INFORMATION DO THEY SEEK?



Travel Information Sources & Information Sought

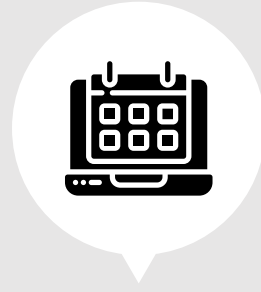


He primarily gathers information from **traveller reviews**, while also seeking **expert recommendations** and using **search engines**

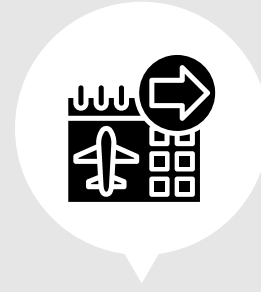


He mainly looks **for travel routes, top attractions, and transport options**, reflecting his preference for hassle-free, well-organised trips

SEGMENT E: ASPIRATIONAL EXPLORERS HOW DO THEY TRAVEL?



Rahul **decides his destinations at least 2 months in advance and makes bookings 1-4 weeks** before departure. He typically stays at the destination for **10 days** and spends **~ INR 365K*** per trip



He prefers booking **all-inclusive packages** or, occasionally, **packaged tours**



At the destination, he usually stays in **3-5-star** hotels, which he selects based on **official grading of accommodation** and **user reviews**



He relies on **city/inter-city local transport or ride-sharing apps** to get around

Note: Amount spent on trip is in thousands (K)

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

WHAT DO THEY ASSOCIATE WITH SOUTH AFRICA?



He strongly associates South Africa with its **rich culture and history, adventure activities, natural scenic beauty, wildlife safaris, and good cuisine**, making it a destination that feels both enriching and exhilarating



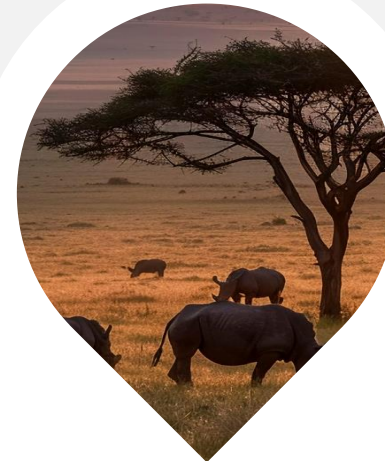
Culture, Diversity,
History



Adventure



Natural Scenic
Beauty



Wildlife Safaris/
Nature Reserves



Good Cuisine

WHAT MEDIA DO THEY ENGAGE WITH MOST?



He actively uses **user-generated video platforms** and **social networks**, subscribes to **streaming and music services**, and moderately engages with **television**



User Generated Video Websites/ Apps



YouTube

Social Networking & Other Websites



Google

facebook



ChatGPT

Subscription Music Services



Spotify



JioSaavn

Downloadable Paid TV/
Film/Music Content



amazon

TV
(e.g., Broadcast TV, On-demand TV,
Online subscription TV)



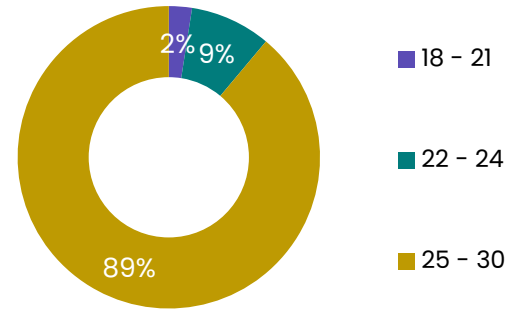
INDIA TV



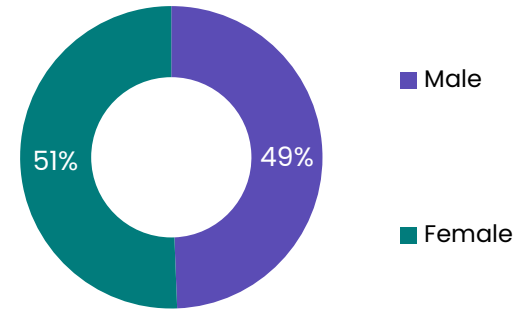
SEGMENT E: ASPIRATIONAL EXPLORERS DETAILED PROFILE



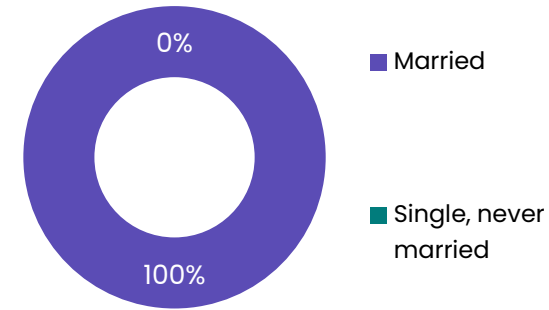
AGE



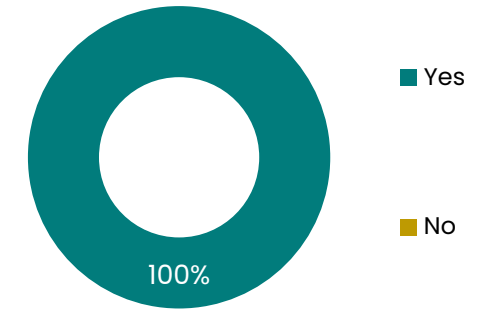
GENDER



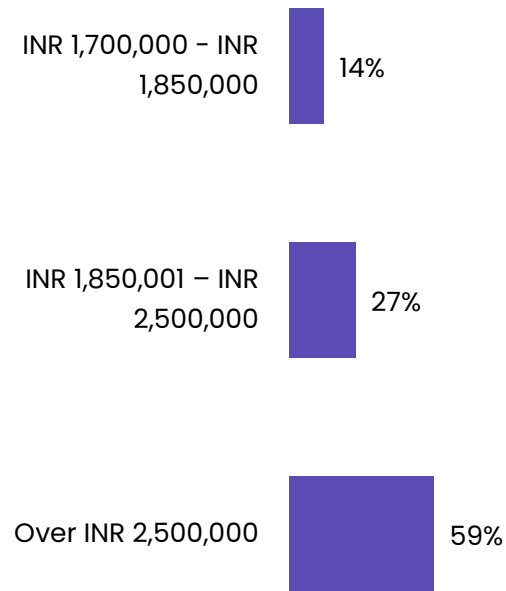
MARITAL STATUS



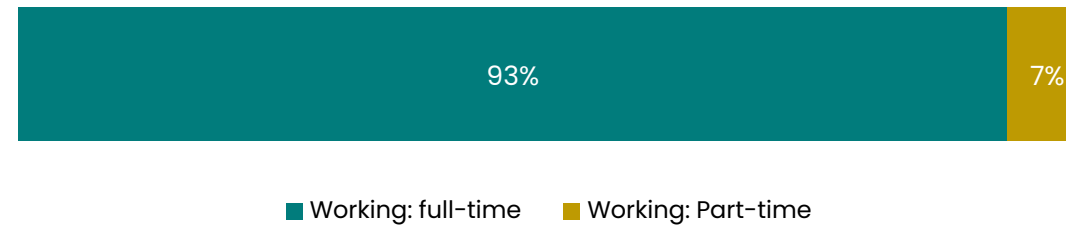
DEPENDENT CHILDREN



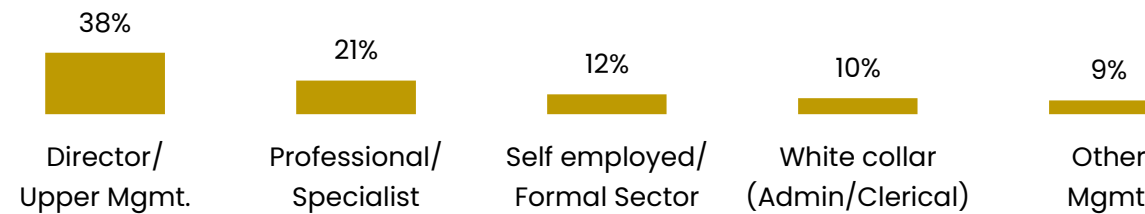
ANNUAL HOUSEHOLD INCOME



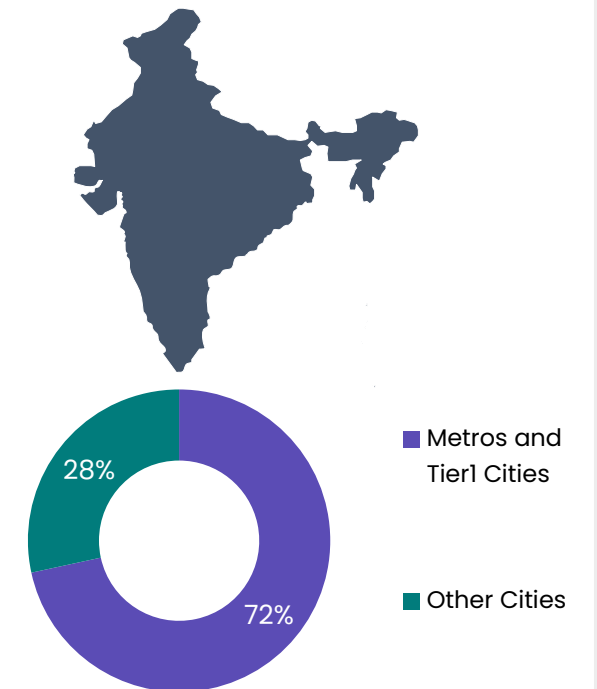
EMPLOYMENT STATUS



CURRENT ROLE/ DESIGNATION



CITY TIER OF RESIDENCE



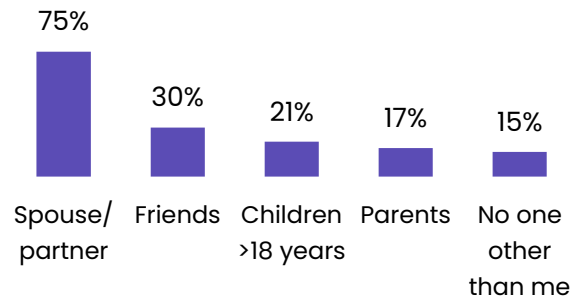
Base (n)= 81

SEGMENT E: ASPIRATIONAL EXPLORERS

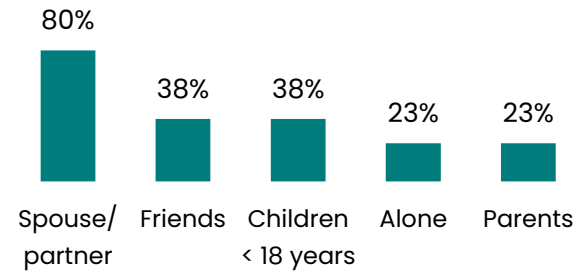
TRAVEL SPECIFICS



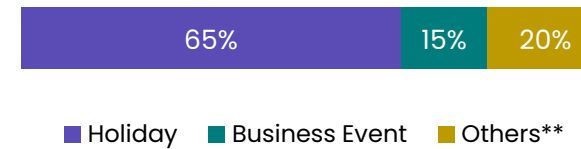
TRAVEL PLANNERS



TRAVEL COMPANION

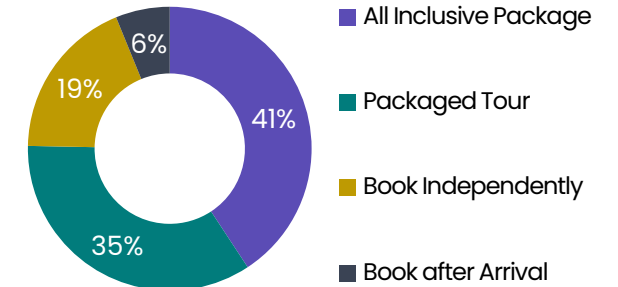


PRIMARY PURPOSE OF VISIT



**Others include special event, shopping, major events, backpacking & sport spectating, visiting friends or relatives, religious

BOOKING PREFERENCE



ACTIVITIES SOUGHT

Natural attractions 41%

Adventure 36%

Social 19%

Cultural heritage 17%

Nightlife 17%

DESIRABLE FACTORS

Safe and secure environment 86%

Welcoming people you can interact with 83%

Wide variety of experiences 83%

Has iconic places 81%

Offers good cuisine 81%

SOURCES OF INFORMATION#

Travellers reviews 44%

Expert recommendations 42%

Search engines 41%

Recommendations by AI 38%

Social networking websites 37%

FREQUENCY OF ANNUAL TRAVEL



~ 2.2 Trips

AVERAGE TRIP DURATION



~ 10 Days

AVERAGE SPEND*



~ INR 365,134

Base (n)= 81

Note: #Sources of Information includes primary and secondary sources

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

TRAVEL ATTITUDE & BEHAVIOUR



WHAT THEY LOOK FOR	ASPIRATIONAL EXPLORERS (Top 2 Box%)
Adventure and new experiences are a big reason I travel	77%
I enjoy capturing moments through photos/ videos and posting because that keeps the travel experience alive	75%
I prefer spending on experiences that help me and or my family learn and grow	75%
I enjoy sharing how many countries I've been to with friends, family, and on social media	74%
I travel to relax and have fun while truly experiencing the essence of a place	73%
I like to explore a destination at my own pace rather than rushing through it	72%
Travel feeds my curiosity and gives me a sense of joy	72%
TV shows, movies or documentaries often inspire me to visit new places	72%
Experiencing local cuisine is a key reason I travel	70%
I choose destinations and activities based on my travel companions	70%

WHAT THEY'RE LESS INTERESTED IN	ASPIRATIONAL EXPLORERS (Top 2 Box%)
I prefer not to visit the same destination more than once	42%
I only start detailed travel planning once my visa is confirmed	49%
I prefer to travel during off-peak seasons when prices are lower	49%
I typically avoid shopping during holidays	49%
I do not compromise on my travel experience when I travel internationally	52%
I avoid destinations that are usually overcrowded	53%
I am more likely to stay at local accommodations that promote sustainability	54%
I rely on AI tools to make travel planning easier	57%
I prefer to travel during off-peak seasons to avoid crowds	57%
When I'm unsure about a destination, I use a travel agent for planning and booking	58%

Base (n)= 81

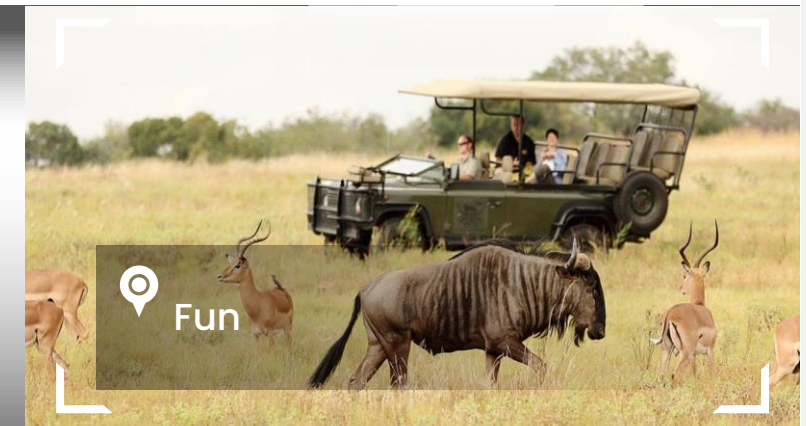
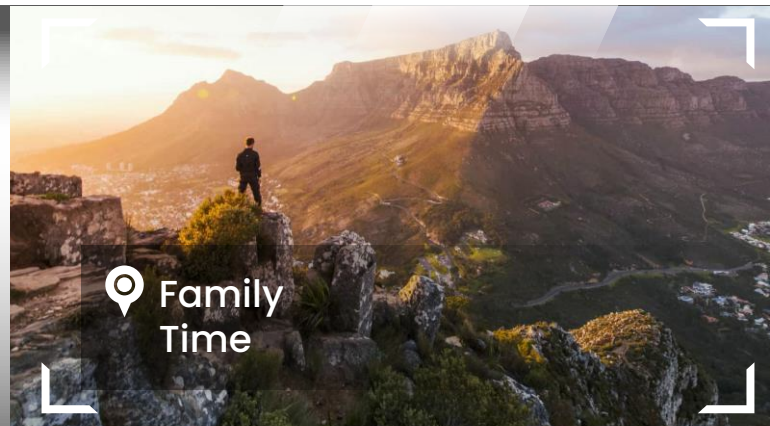
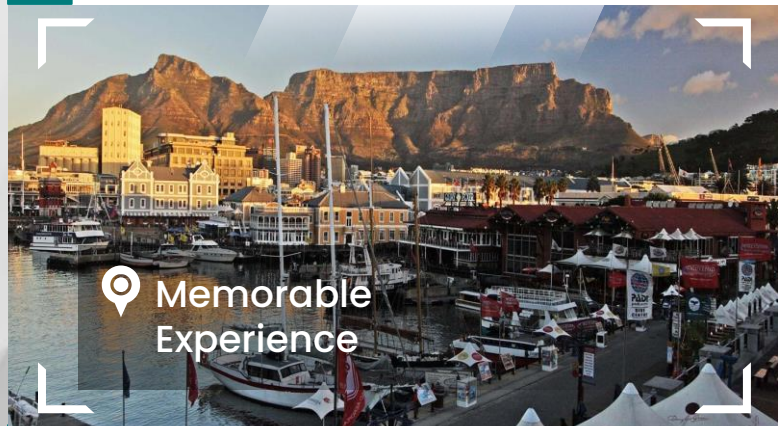
WHAT SHOULD BE THE FOCUS OF OUR MESSAGING?

SEGMENT E: ASPIRATIONAL EXPLORERS

INSIGHT



Travellers seek destinations that help create **memorable experiences** with **family** and offer **fun** and entertainment options



ACTION



- ✓ Position South Africa as a **family-friendly destination** for **memorable experiences**, highlighting various attractions that are perfect getaways for families
- ✓ Highlight shared **family activities** that **blend learning with fun**

WHEN SHOULD WE BE ON-AIR?

SEGMENT E: ASPIRATIONAL EXPLORERS



Travel planning typically begins **at least two months before departure**, with demand peaking in **January and December**



- ✓ Actively promote South Africa across platforms, with **higher spends allocated in the last quarter of the year** (October to December) to ensure visibility ahead of the year-end and New Year travel surge

WHAT SHOULD BE OUR OPTIMAL MEDIA MIX?

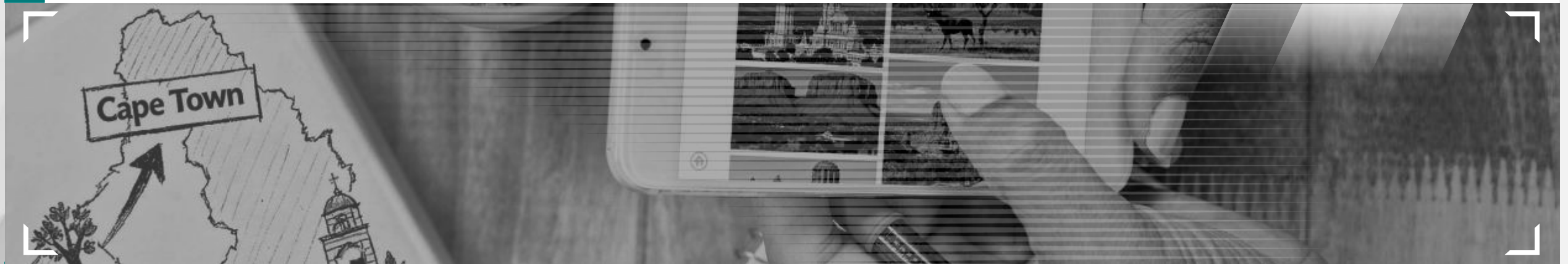
SEGMENT E: ASPIRATIONAL EXPLORERS



INSIGHT



Travellers consume content across **user-generated video platforms and social networking sites, along with subscription music services**, as part of their everyday entertainment



ACTION



✓ To **maximise reach and engagement, prioritise** advertising on

USER GENERATED VIDEO WEBSITES/APPS



SOCIAL & SEARCH PLATFORMS



ChatGPT

SUBSCRIPTION MUSIC SERVICE



WHAT SHOULD OUR TRADE PARTNERS PROMOTE?

SEGMENT E: ASPIRATIONAL EXPLORERS

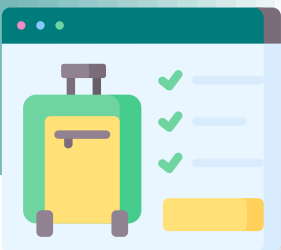
INSIGHT



Travellers prefer **all-inclusive or packaged tours** that simplify trip planning and reduce the need to manage multiple bookings



ACTION



- ✔ Promote all-inclusive and packaged tours through trusted trade partners to help ease the **planning and booking process**

WHAT PLATFORMS AND CONTENT AREAS MATTER MOST?

SEGMENT E: ASPIRATIONAL EXPLORERS

INSIGHT



Travellers rely on a combination of peer reviews, expert advice, and searches for information. The key details sought include travel routes, key attractions, and transport options at the destination



ACTION



- ✓ Actively manage and enhance traveller reviews on platforms such as Tripadvisor and Goibibo to highlight routes, attractions, and transport convenience
- ✓ Feature expert-curated recommendations and detailed destination guidance on Agoda and Booking.com to support informed planning and build credibility

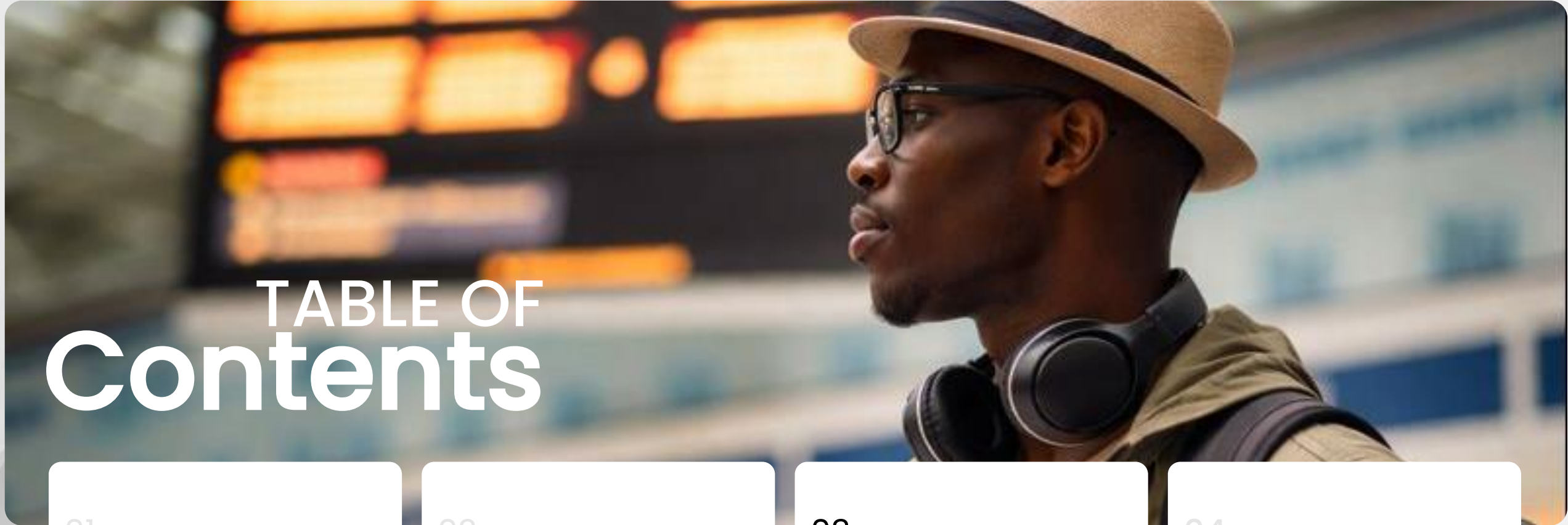


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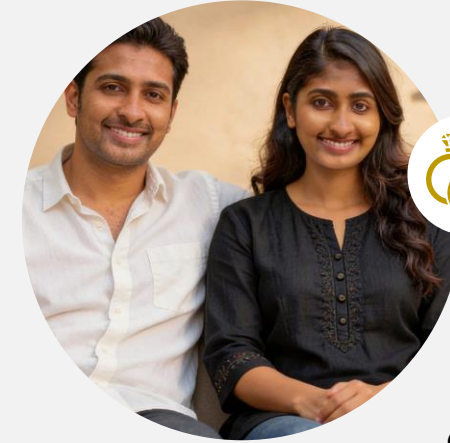
Cross-segment Analysis

SEGMENT F: SCENIC ADVENTURERS
WHO ARE THEY?



MEET PRIYA

A **27-year-old female**,
residing in a metro or
tier 1 city (Delhi /
Bengaluru /Mumbai)



MARRIED
and her annual
household income
is ~ **INR 5.07 mn**



WORKS FULL-TIME
in the **upper**
management

SEGMENT F: SCENIC ADVENTURERS WHY DO THEY TRAVEL?



Her travel needs are driven by quality **family time and natural scenic beauty**. She seeks **memorable experiences** filled with **fun, adventure activities, and good shopping experiences**. This shows her preference for destinations that offer togetherness, enjoyment, and lively experiences

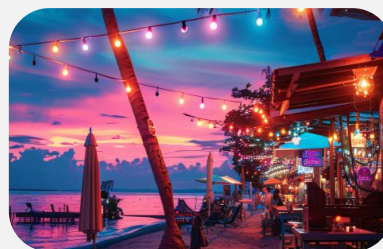
Travel Needs



Family Time



Natural/ Scenic
Beauty



Fun



Shopping
Experience



Adventure



Memorable
Experience

“ WHAT OTHER SCENIC ADVENTURERS HAVE TO SAY? ”

“There’s something special about the mountains. They make me feel calm, peaceful, and happy. These beautiful mountains inspire me to face my fears and try new things. The mountains are my happy place, my safe haven, and my love.”

“Traveling is always fun, but traveling with friends makes it even better. The road trips, late night talks, and shared adventures bring so much joy. If you haven’t done it yet, plan a trip with your friends at least once a year. These are the memories that stay with you forever.”

WHAT IS THEIR BEHAVIOUR?

TRAVEL PURPOSE

Travel brings her **happiness and emotional fulfilment** — she travels not just to unwind, but to create **joyful, lasting memories**. She is driven by **curiosity** and a desire to **experience something new**, prioritising destinations that let her **relax** while truly experiencing the essence of a place

“

Travel gives me sunsets in unfamiliar cities, conversations with strangers who feel like home, silence in the mountains that heals louder than words, and memories that stay long after the trip ends. I come back with a lighter heart, a fuller soul, and stories no bank balance can measure.



WHAT IS THEIR BEHAVIOUR?

EXPERIENCES SOUGHT

Good food is an integral part of her journey. **Cultural and historic landmarks** influence her choice of destination. She prefers experiences that support **locals and preserve culture and actively opts for eco-friendly travel options**. She seeks to experience **local life**, not just tourist highlights. **Safety is her top priority.**

“

You travel for the people, the food and the culture as much as you do for the buildings and the landscapes. Stay in some BnBs, eat from local restaurants, sip local beer and talk to some locals.



WHAT IS THEIR BEHAVIOUR?

INFORMATION SOURCES

Her choice of destination is influenced by **online content**. She actively follows **travel influencers** for ideas and draws inspiration from **shows and documentaries**. She enjoys capturing and sharing photos/videos to relive her travel experiences

“

Because I follow travel influencers who have the same preferences as mine, this makes me trust them more than internet travel agent reviews... Their page gives me ideas for accommodations, tourist attractions, and transportation.



WHERE AND WITH WHOM DO THEY TRAVEL?



— Travel Frequency, Destinations & Travel Companions



Priya takes **two to three long-haul trips** each year and has recently travelled to prominent destinations in Europe (UK, Switzerland) and North America (USA)

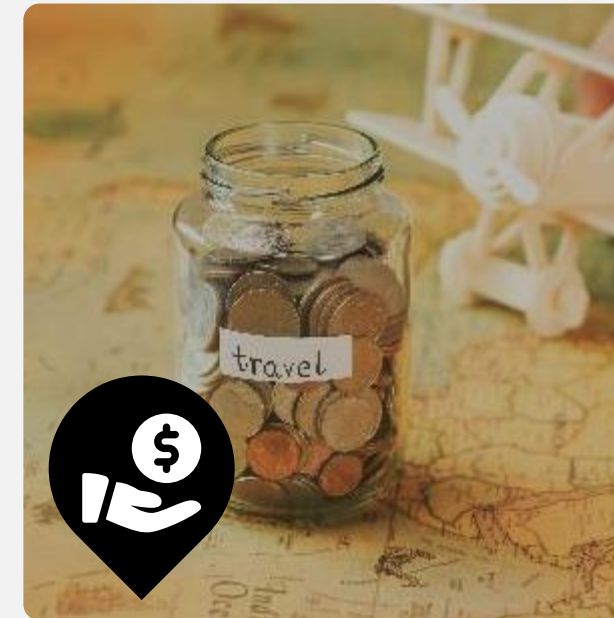


She **travels with her spouse, or with her family, including children**, planning each trip together with her spouse

Preferred Travel Months & Travel Motivators



She plans her trips around **December and January** due to **favourable weather, time-off from work and the holiday season**, and a **less-crowded holiday experience**



For her, **cost-effective tour packages, special events and activities, and family events** would motivate her to travel outside her preferred months

WHERE AND WHAT INFORMATION DO THEY SEEK?



Travel Information Sources & Information Sought

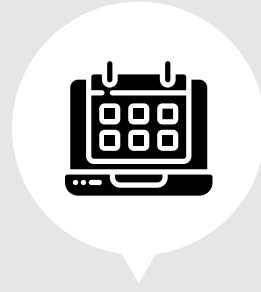


She relies on **traveller reviews and expert recommendations** for information. She also seeks input from **search engines, social networks, and platforms**

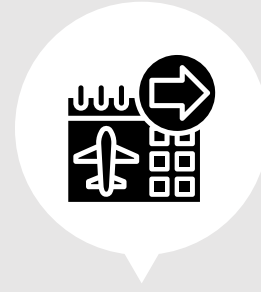


She primarily looks for information on **major tourist attractions, activities at the destination, and transport facilities**

SEGMENT F: SCENIC ADVENTURERS HOW DO THEY TRAVEL?



Priya **decides her destinations at least 2 months in advance and makes bookings 1-4 weeks** before departure. She typically stays at the destination for **10 days** and spends **~ INR 451K*** per trip



She prefers booking **all-inclusive packages** that cover airfare, accommodation, meals, sightseeing, and local transport



She usually stays in **3-5-star hotels or bed and breakfast accommodations** which she selects based on **travellers' reviews**



She relies on **city/inter-city local transport or ride sharing apps** to get around

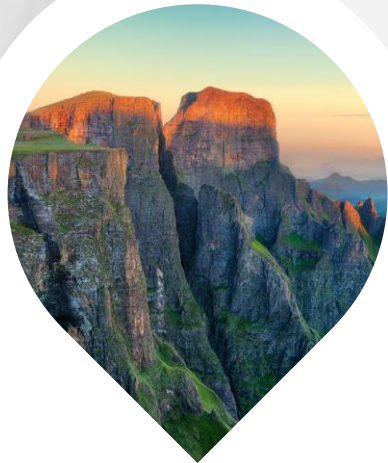
Note: Amount spent on trip is in thousands (K)

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

WHAT DO THEY ASSOCIATE WITH SOUTH AFRICA?



She associates South Africa with its **natural scenic beauty**, as well as its **rich culture and history, value for money experiences, and the legacy of Nelson Mandela**



Natural Scenic
Beauty



Culture, Diversity,
History



Value for Money
Tourism Destination



Home of Nelson
Mandela

WHAT MEDIA DO THEY ENGAGE WITH MOST?



She relies largely on **TV and paid streaming content** for entertainment, while also engaging with **social networking platforms and music subscriptions**



TV
(Broadcast TV, On-demand TV, Online subscription TV)



Downloadable Paid TV/Film/Music Content



Social Networking & Other Websites



Subscription Music Services



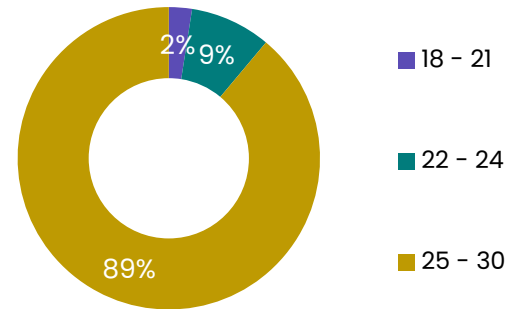
User Generated Video Websites/ Apps



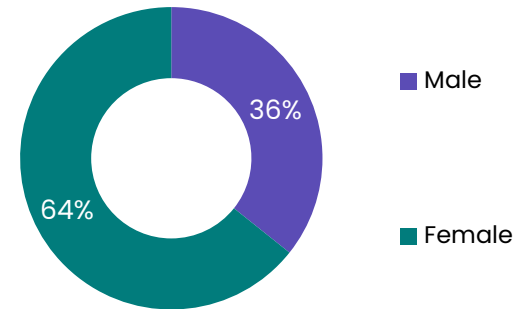
SEGMENT F: SCENIC ADVENTURERS DETAILED PROFILE



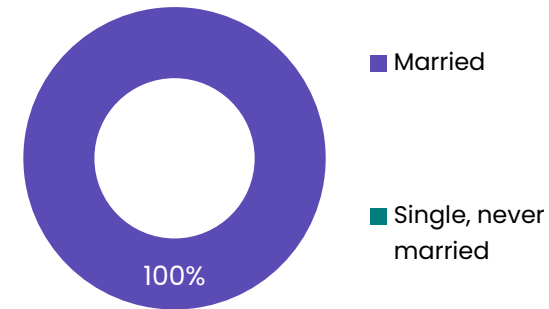
AGE



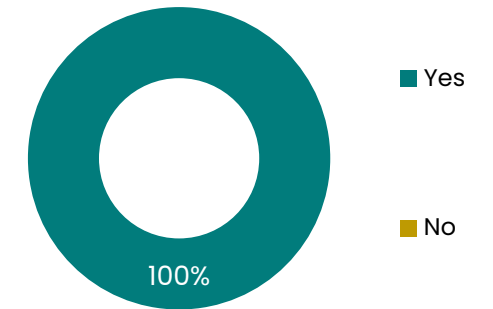
GENDER



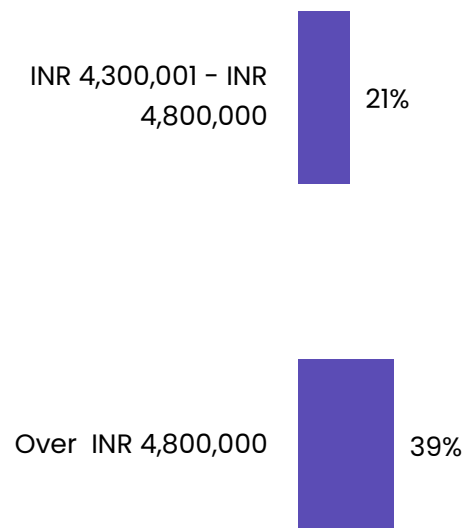
MARITAL STATUS



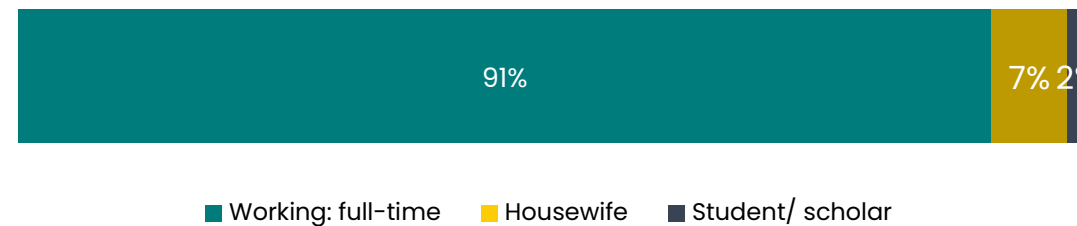
DEPENDENT CHILDREN



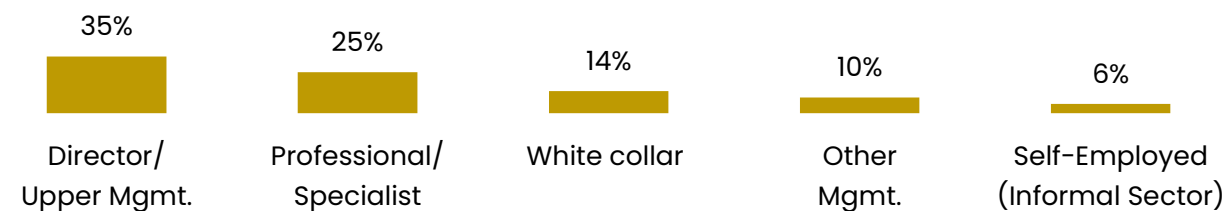
ANNUAL HOUSEHOLD INCOME



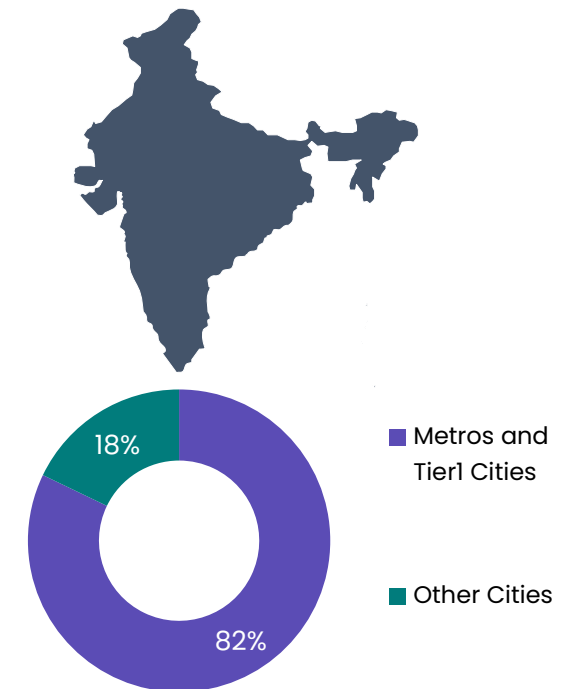
EMPLOYMENT STATUS



CURRENT ROLE/ DESIGNATION



CITY TIER OF RESIDENCE

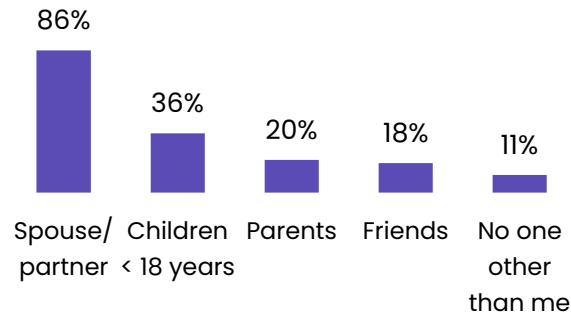


Base (n) = 56

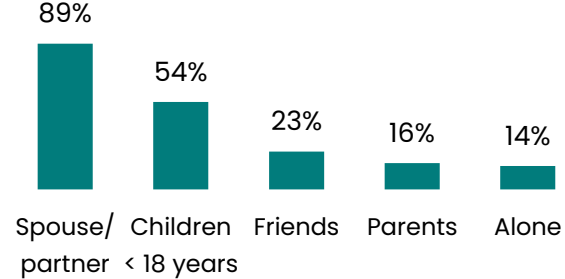
SEGMENT F: SCENIC ADVENTURERS TRAVEL SPECIFICS



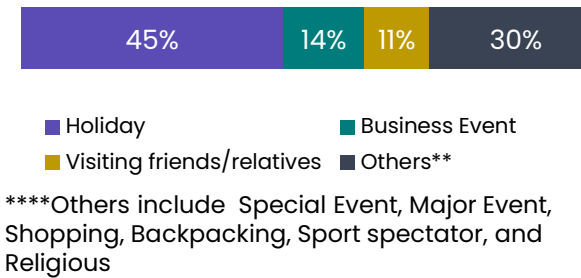
TRAVEL PLANNERS



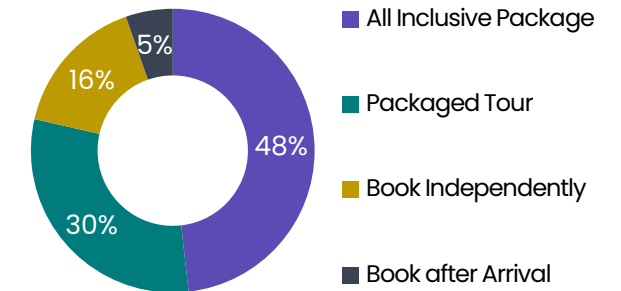
TRAVEL COMPANION



PRIMARY PURPOSE OF VISIT



BOOKING PREFERENCE



ACTIVITIES SOUGHT

Adventure 34%

Relaxing 27%

Natural attractions 27%

Shopping 20%

Business events 20%

DESIRABLE FACTORS

Environment friendly practices 93%

Good family experience 89%

Safe & secure environment 86%

Wide variety of experience 80%

Natural scenic beauty 79%

SOURCES OF INFORMATION#

Traveller reviews 48%

Expert recommendations 48%

Search engines 41%

Social networking websites 39%

Recommendations by AI 38%

FREQUENCY OF ANNUAL TRAVEL



~ 2.6 Trips

AVERAGE TRIP DURATION



~ 10 Days

AVERAGE SPEND*



~ INR 450,795

Base (n) = 56

Note: #Sources of Information includes primary and secondary sources

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

SEGMENT F: SCENIC ADVENTURERS

TRAVEL ATTITUDE & BEHAVIOUR



WHAT THEY LOOK FOR	SCENIC ADVENTURERS (Top 2 Box%)
I prioritise safety and security when selecting an accommodation	80%
Travel feeds my curiosity and gives me a sense of joy	79%
I travel to create joyful, lasting memories	77%
Online content often impacts my choice of travel destinations and activities	77%
Experiencing local cuisine is a key reason I travel	75%
I prefer experiences that benefit locals and keep their local culture alive	75%
I enjoy capturing moments through photos/ videos and posting because that keeps the travel experience alive	73%
I follow travel influencers on social media to know about interesting destinations	73%
I travel to relax and have fun while truly experiencing the essence of a place	73%
Visiting culturally or historically significant landmarks is important to me	73%

WHAT THEY'RE LESS INTERESTED IN	SCENIC ADVENTURERS (Top 2 Box%)
Saving money on my trip allows me to upgrade other parts of the experience that matter more to me	46%
I typically avoid shopping during holidays	46%
When I travel with my family, I prefer to book through travel agents for assurance purposes	46%
I rely on AI tools to make travel planning easier	50%
I prefer not to visit the same destination more than once	50%
When I'm unsure about a destination, I use a travel agent for planning and booking	52%
My travel itineraries are often inspired by bloggers and influencers I follow	55%
I only start detailed travel planning once my visa is confirmed	57%
AI tools are a travel companion for me that help me stay in control of my trip	57%
I avoid destinations that are usually overcrowded	57%

Base (n)= 56

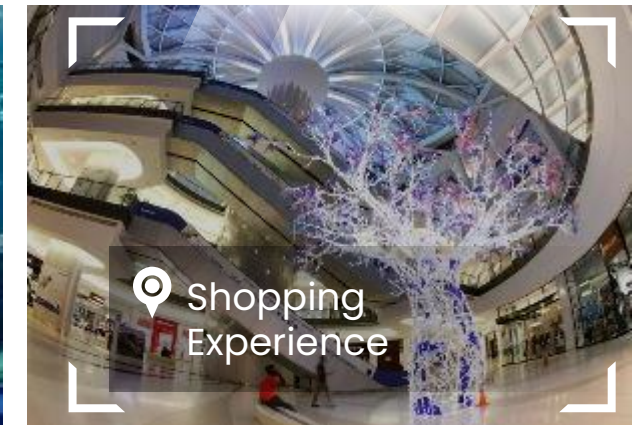
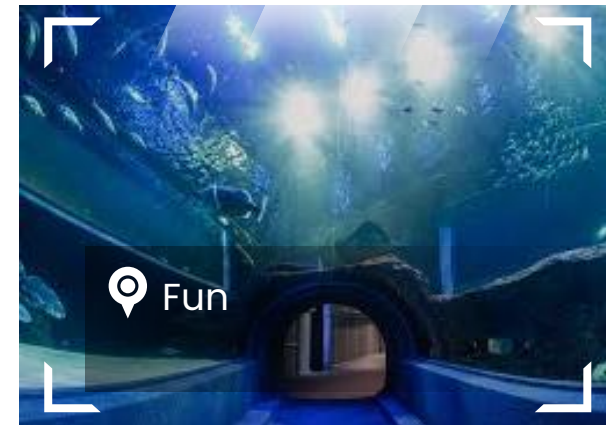
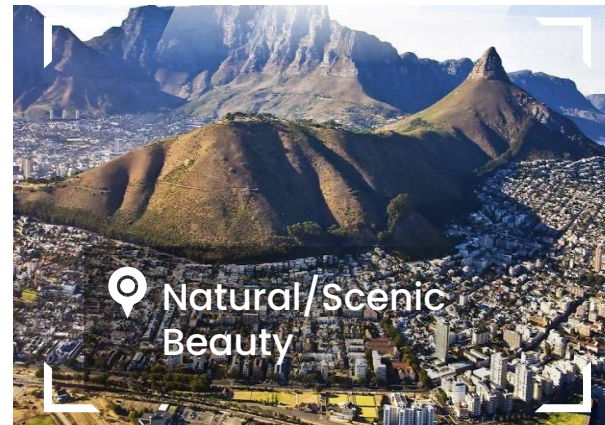
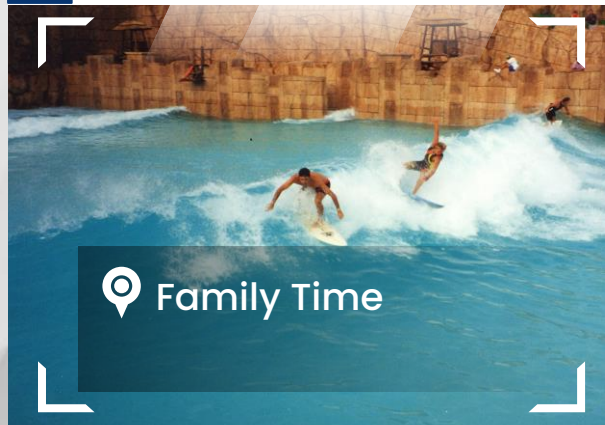
WHAT SHOULD BE THE FOCUS OF OUR MESSAGING?

SEGMENT F: SCENIC ADVENTURERS

INSIGHT



Travellers look for destinations that are rich in **scenic beauty**, enable **quality family time**, and offer **shopping and fun experiences**



ACTION



- ✓ Position South Africa as a family-friendly destination with scenic backdrops, highlight the key natural attractions across the country
- ✓ Promote shopping and entertainment hubs that offer a mix of shopping experiences along with fun activities for the family

WHEN SHOULD WE BE ON-AIR?

SEGMENT F: SCENIC ADVENTURERS

INSIGHT



Scenic Adventurers plan their trips **at least two months in advance**, with **January and December** being the peak travel months



ACTION



- ✓ Increase activity across multiple platforms during the last quarter (October–December) to boost conversions in the peak travel months

WHAT SHOULD BE OUR OPTIMAL MEDIA MIX?

SEGMENT F: SCENIC ADVENTURERS

INSIGHT



Media consumption includes both traditional like **TV** and new-age platforms such as paid downloadable TV, film, and music content, as well as social networking sites



ACTION



✓ To maximise reach and engagement, prioritise advertising on

TV PLATFORMS



PREMIUM VIDEO & AUDIO SERVICES



SOCIAL & SEARCH PLATFORMS

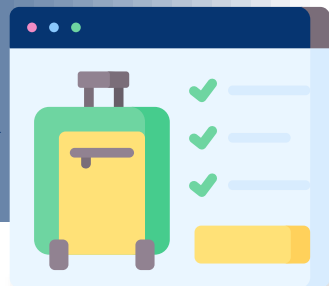


WHAT SHOULD OUR TRADE PARTNERS PROMOTE?

SEGMENT F: SCENIC ADVENTURERS



Travellers look for **all-inclusive packages** that help reduce the complexity of organising multiple trip elements



✔ **Promote all-inclusive tour packages** through trusted travel trade partners, highlighting the ease of booking

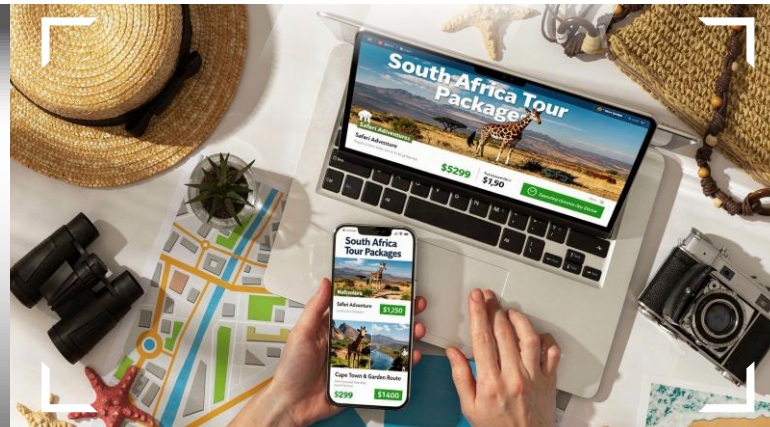
WHAT PLATFORMS AND CONTENT AREAS MATTER MOST?

SEGMENT F: SCENIC ADVENTURERS

INSIGHT



Travellers rely on **peer reviews, expert recommendations, search engines, and social media platforms** for information, primarily seeking details on **major tourist attractions, activities at the destination, and transport facilities**



ACTION



- ✓ **Optimise destination listings and traveller reviews on travel platforms like Agoda, Booking.com, and Yatra to highlight major attractions, activity options, and local transport options**
- ✓ **Ensure expert-led content and verified reviews clearly covering travel logistics and on-ground experiences to build traveller confidence**

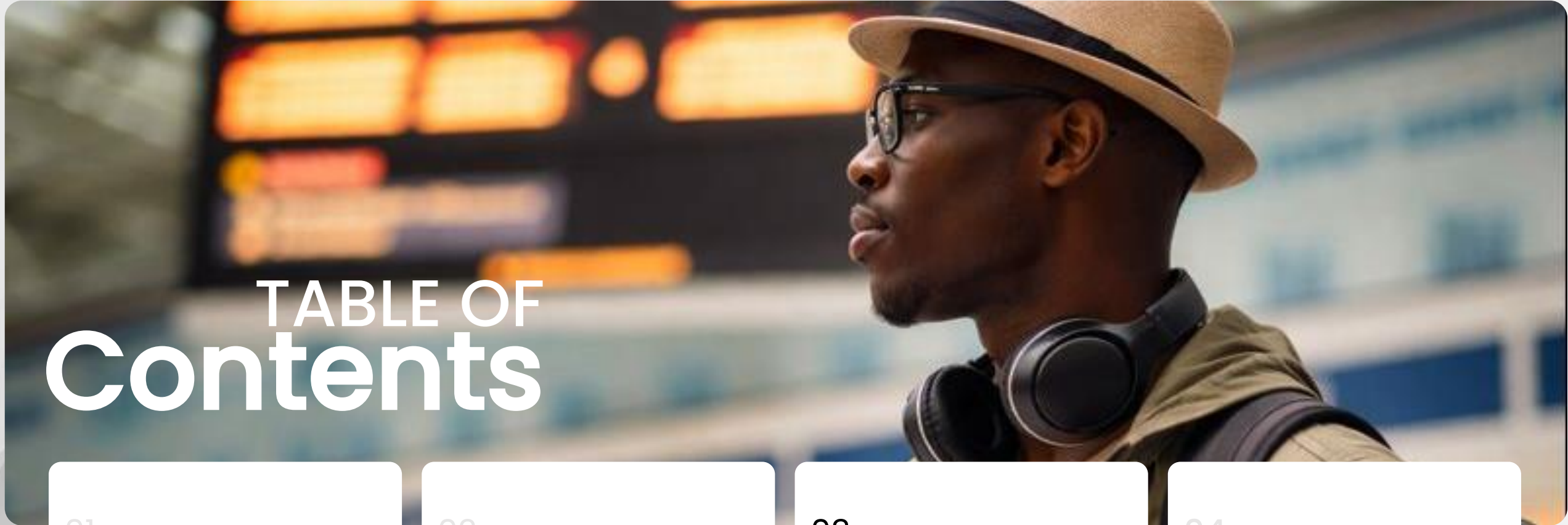


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SEGMENT K: JETSETTERS
WHO ARE THEY?**MEET POOJA**

A **35-year-old female**,
residing in a metro/ tier 1
city (Delhi /
Hyderabad /Mumbai)



MARRIED
and her annual
household income
is ~ **INR 4.99 mn**



WORKS FULL-TIME
in the **upper**
management

WHY DO THEY TRAVEL?



She seeks **natural scenic beauty and quality family time** during her travels. She also looks for **fun experiences, good shopping** options, and **relaxation** on her trips, reflecting a preference for destinations that combine nature, togetherness, and enjoyable leisure activities

Travel Needs



Natural/ Scenic
Beauty



Family Time



Escapism/
Relaxation



Fun



Shopping
Experience

WHAT OTHER JETSETTERS HAVE TO SAY?

"I escape to serene beaches on a relaxing family getaway, filled with snorkelling over vibrant corals, magical sunsets, and island vibes. With kid-friendly activities, stunning marine life, and warm hospitality, the vacation became a perfect mix of relaxation, scenic beauty, and unforgettable family moments."

"Escape and immerse yourself in nature's paradise! Enjoy breathtaking valley views, butterfly-filled mornings, and the serene sounds of waterfalls. Perfect for unforgettable getaways with stunning views and ultimate comfort."

WHAT IS THEIR BEHAVIOUR?

TRAVEL MINDSET

Travel is not an occasional indulgence for her; it is a part of who she is. She **actively shares the number of countries she has visited** as a mark of accomplishment. She **prioritises travel over luxury goods** and prefers to spend on **experiences that help her and her family grow**

“

I see travel as an investment in the soul—never an expense—because it leaves you richer with experiences and amazing stories to tell.

”



WHAT IS THEIR BEHAVIOUR?

EXPERIENCES SOUGHT

Travel is her way to **relax, recharge, and feel alive**. She plans different holidays for different travel companions, balancing **family time, friendships, and couple travel**.

She **enjoys planning trips** and carefully chooses destinations based on the occasion and her travel companions, always seeking a mix of **relaxation and excitement, preferring experiences that support locals**

“

We really enjoy looking for options on the Internet and planning the trip... we have the time to do so and our yearly overseas trip is the highlight of our year so planning is very important for us.



WHAT IS THEIR BEHAVIOUR?

INFORMATION SOURCES AND BOOKING PREFERENCE

Online content and influencers guide her choice of destination. She **documents her journeys** to keep the experiences alive. She prefers **direct flights for convenience** and chooses destinations with **simpler visa processes. Safety is important** to her. She prioritises **trusted accommodations** and relies on **travel agents for reassurance** when travelling with her family

“

Instagram, TikTok, and YouTube don't just inspire me; they're even on track to handle bookings.

”



WHERE AND WITH WHOM DO THEY TRAVEL?



— Travel Frequency, Destinations & Travel Companions



Pooja takes **three long-haul trips** each year and has recently travelled to prominent destinations in Europe (UK, Switzerland) and North America (USA)



She usually **travels with her spouse**, or **with her family, including children**, and plans her trips in consultation with her spouse

Preferred Travel Months & Travel Motivators



She plans her trips around **May** due to **holidays, time off from work, and shopping festivals/seasons at the destination**



For her, **cost-effective tour packages, favourable weather, and prices comparable to domestic trips** would motivate her to travel outside her preferred months

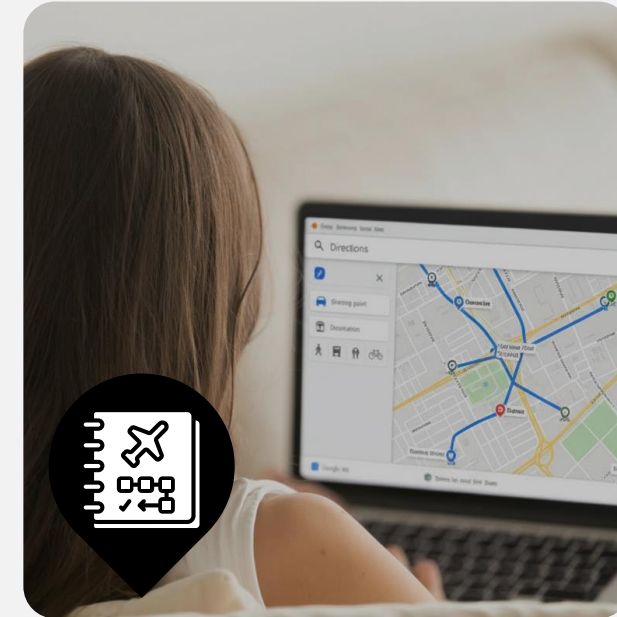
WHERE AND WHAT INFORMATION DO THEY SEEK?



Travel Information Sources & Information Sought

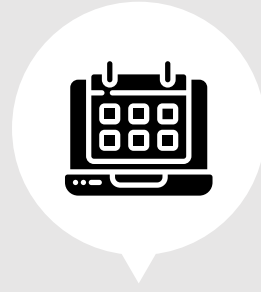


She relies on **expert recommendations** while also drawing inspiration from **traveller reviews and search engines**

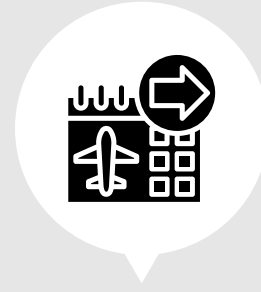


She looks for **experiences at the destination, travel routes, and reliable transport options**, reflecting her need for safety and hassle-free travel

SEGMENT K: JETSETTERS HOW DO THEY TRAVEL?



Pooja **decides her destinations at least 2 months in advance and makes bookings 1-4 weeks** before departure. She typically stays at the destination for **8 days** and spends **~ INR 465K*** per trip



She prefers booking **all-inclusive packages** that cover airfare, accommodation, meals, sightseeing, and local transport



She usually stays in **5-star hotels**, which she selects based on **official grading of the accommodation**



She relies on **transport arranged by tour operator/ travel agent, city/ Inter-city local transport, or a chauffeur-driven car** to get around

Note: Amount spent on trip is in thousands (K)

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred

WHAT DO THEY ASSOCIATE WITH SOUTH AFRICA?



She considers South Africa as a **value for money** destination and associates it with **cultural diversity and history, wildlife and safaris, natural scenic beauty, vibrant nightlife, and adventure activities**



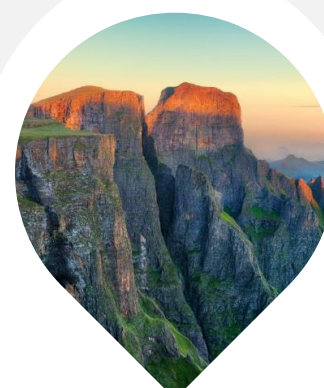
Value for Money
Tourism
Destination



Culture,
Diversity, History



Wildlife Safaris/
Nature Reserves



Natural Scenic
Beauty



Adventure
Activities

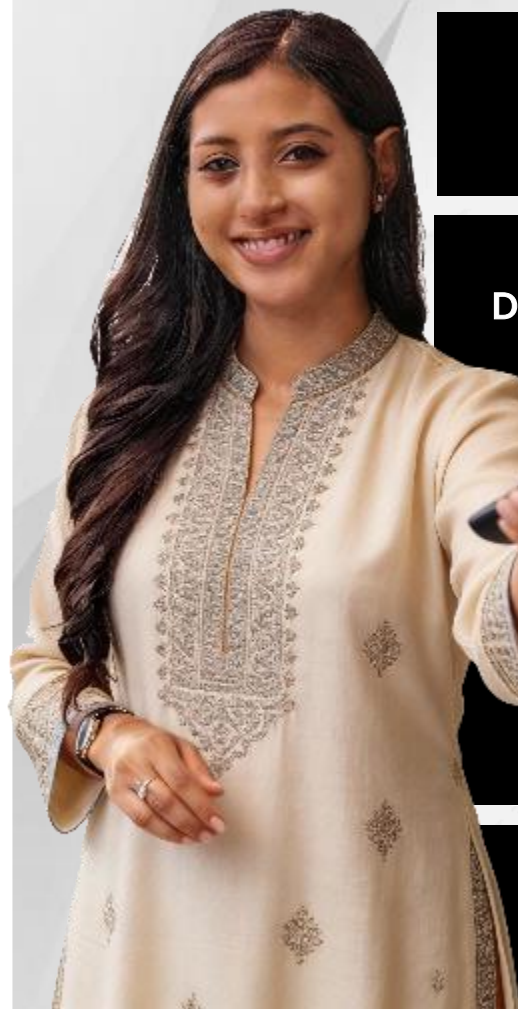


Nightlife

WHAT MEDIA DO THEY ENGAGE WITH MOST?



She primarily engages with **social networking platforms, paid streaming, music subscriptions, TV, and user-generated video apps**, reflecting a strong preference for digital and on-demand content for everyday entertainment



Social Networking & Other Websites



facebook

Google



ChatGPT



Downloadable Paid TV/Film/Music Content



amazon

Subscription Music Services



Spotify

Google Podcasts

TV
(Broadcast TV, On-demand TV,
Online subscription TV)INDIA^{TV}

User Generated Video Websites/ Apps

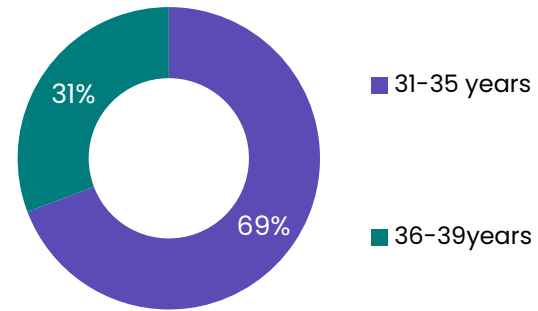


YouTube

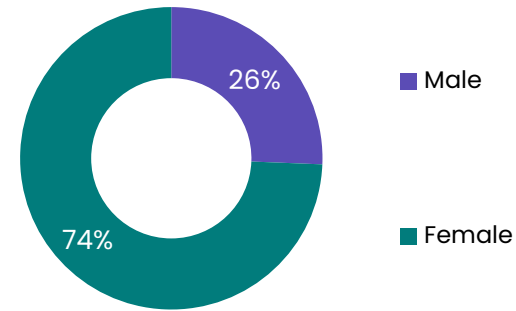
SEGMENT K: JETSETTERS DETAILED PROFILE



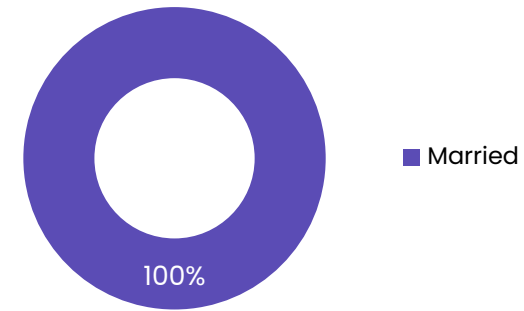
AGE



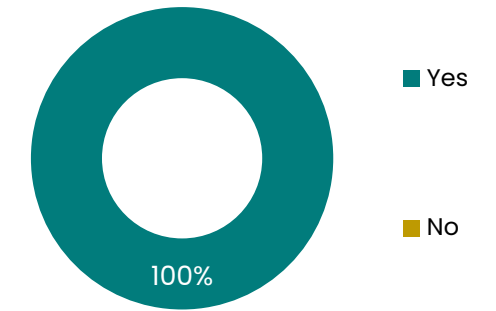
GENDER



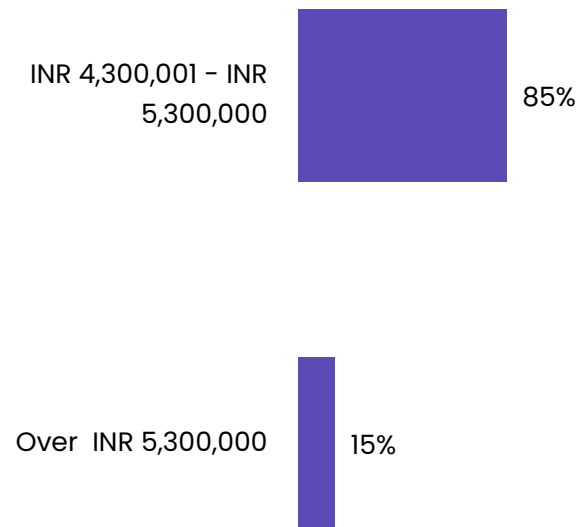
MARITAL STATUS



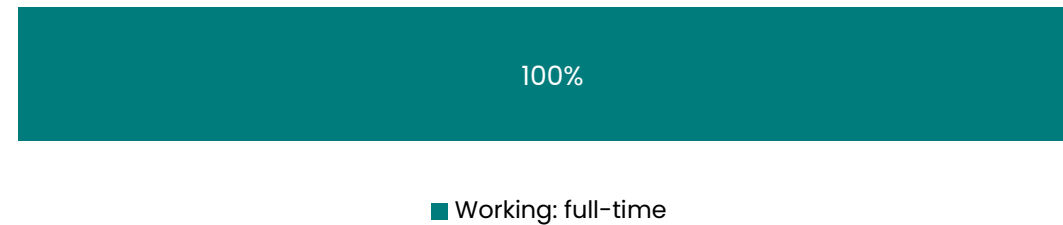
DEPENDENT CHILDREN



ANNUAL HOUSEHOLD INCOME



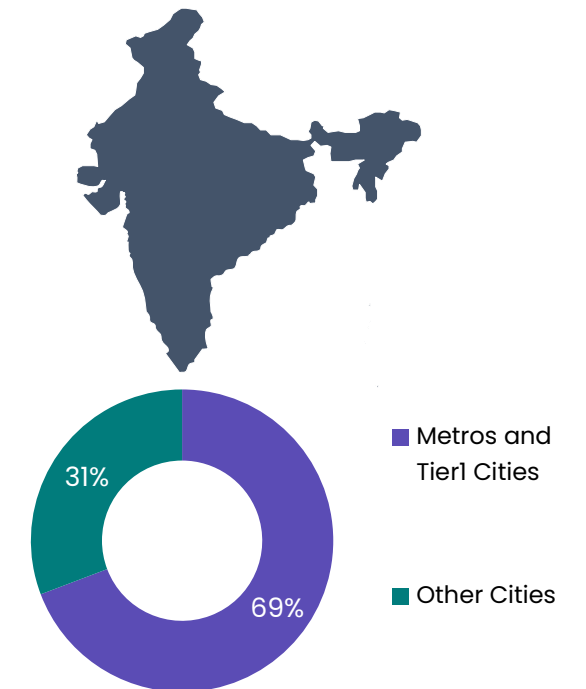
EMPLOYMENT STATUS



CURRENT ROLE/ DESIGNATION



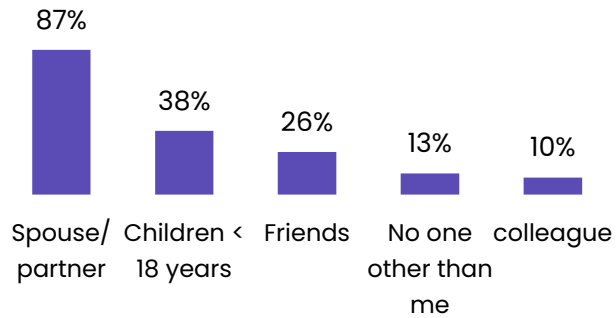
CITY TIER OF RESIDENCE



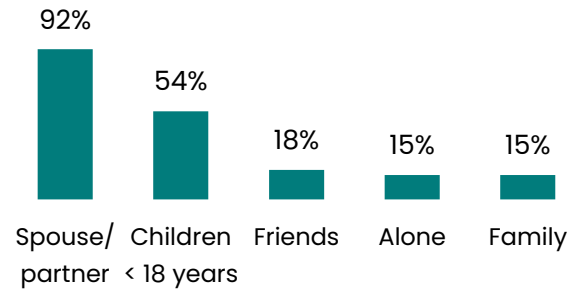
Base (n)= 39

SEGMENT K: JETSETTERS
TRAVEL SPECIFICS

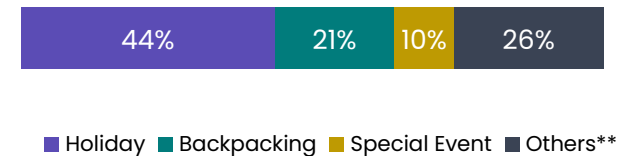
TRAVEL PLANNERS



TRAVEL COMPANION

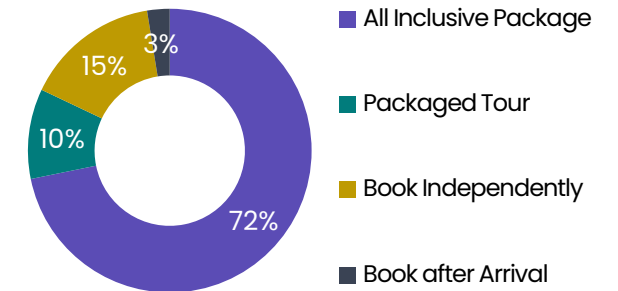


PRIMARY PURPOSE OF VISIT

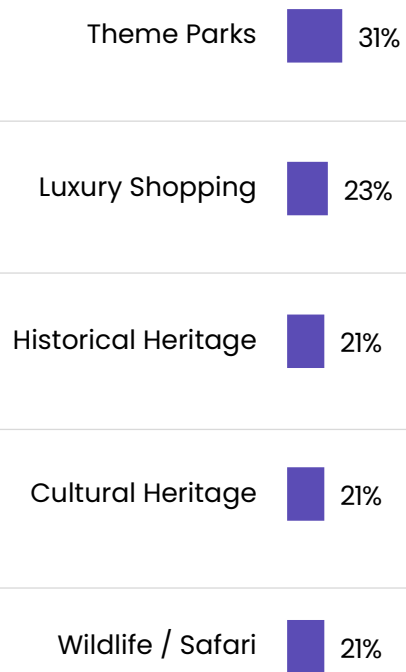


**Others include Sports spectating, shopping, major event, business event

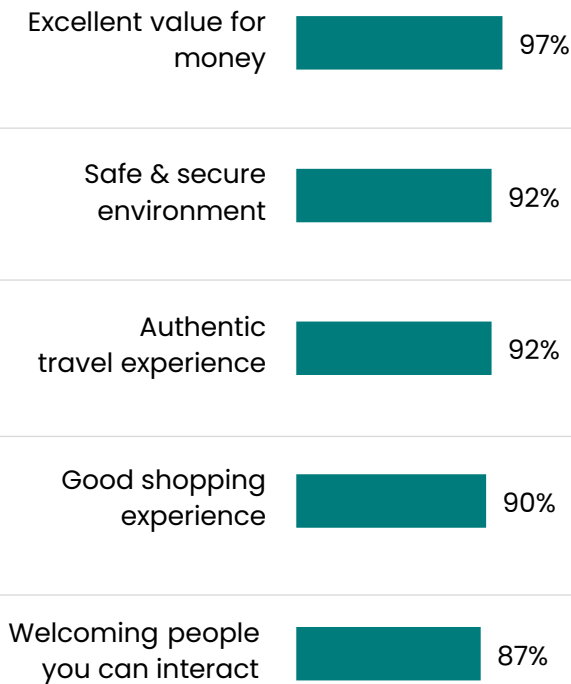
BOOKING PREFERENCE



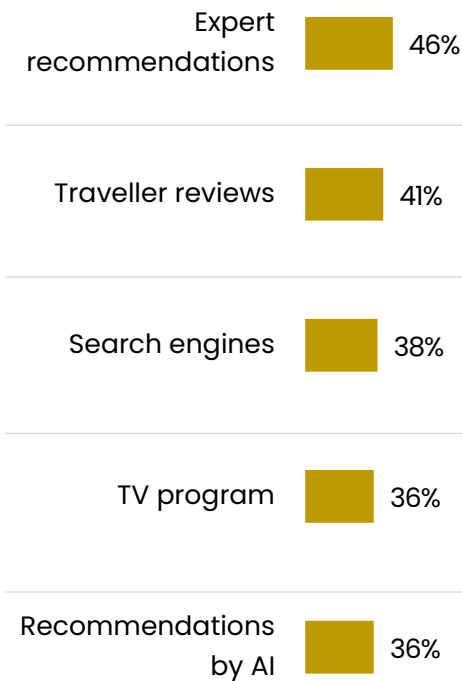
ACTIVITIES SOUGHT



DESIRABLE FACTORS



SOURCES OF INFORMATION#



FREQUENCY OF ANNUAL TRAVEL



~ 3.4 Trips

AVERAGE TRIP DURATION



~ 8 Days

AVERAGE SPEND*



~ INR 465,287

Base (n) = 39

Note: #Sources of Information includes primary and secondary sources

*Average spend includes overall expenses on airfare, hotel/accommodation, local transport, shopping, food, sightseeing, outdoor activities, and any other expenses incurred



WHAT THEY LOOK FOR	JETSETTERS (Top 2 Box%)
I enjoy sharing how many countries I've been to with friends, family, and on social media	95%
I prefer spending on experiences that help me and or my family learn and grow	92%
I travel to relax and have fun while truly experiencing the essence of a place	92%
I enjoy capturing moments through photos/ videos and posting because that keeps the travel experience alive	87%
I intentionally plan separate holidays to balance family time, friendships, and couple time	87%
Planning a trip is one of the most enjoyable parts of travel for me	87%
I prefer to book direct flights to minimise travel time and hassle	85%
I am more likely to choose a destination that offers visa-free or visa-on-arrival access	82%
I prefer experiences that benefit locals and keep their local culture alive	82%
I prefer traveling over buying luxury goods	82%

WHAT THEY'RE LESS INTERESTED IN	JETSETTERS (Top 2 Box%)
I rely on AI tools to get information while traveling	62%
My travel itineraries are often inspired by bloggers and influencers I follow	62%
I typically avoid shopping during holidays	62%
AI tools are a travel companion for me that help me stay in control of my trip	64%
I prefer not to visit the same destination more than once	64%
TV shows, movies or documentaries often inspire me to visit new places	67%
I avoid destinations that are usually overcrowded	69%
I prefer using public transport like trains and buses when traveling because it's a more authentic and affordable experience	69%
Adventure and new experiences are a big reason I travel	69%
I prefer to travel during off-peak seasons to avoid crowds	69%

Base (n) = 39

WHAT SHOULD BE THE FOCUS OF OUR MESSAGING?

SEGMENT K: JETSETTERS



INSIGHT



Jetsetters seek destinations with **natural scenic beauty** where families can slow down, unwind, and spend **quality time together** away from daily routines



ACTION



- ✓ Position South Africa as a serene family destination by showcasing its **scenic landscapes**
- ✓ Highlight relaxation-focused, family-friendly stays, including **nature-based retreats** that encourage **rest and reconnection**

WHEN SHOULD WE BE ON-AIR?

SEGMENT K: JETSETTERS

INSIGHT



Jetsetters finalise their destination **at least two months in advance**, with May being their peak travel month



ACTION



- ✓ **Increase media spending during March–April to maximise visibility** during the consideration window, ensuring South Africa remains top-of-mind

WHAT SHOULD BE OUR OPTIMAL MEDIA MIX?

SEGMENT K: JETSETTERS

INSIGHT



Travellers actively engage with **social platforms** and **access premium, downloadable and subscription-based TV, film, and music content** for everyday entertainment



ACTION



✓ To **maximise reach and engagement**, prioritise advertising on

SOCIAL & SEARCH PLATFORMS



PREMIUM VIDEO & AUDIO SERVICES



SUBSCRIPTION MUSIC SERVICE



WHAT SHOULD OUR TRADE PARTNERS PROMOTE?

SEGMENT K: JETSETTERS



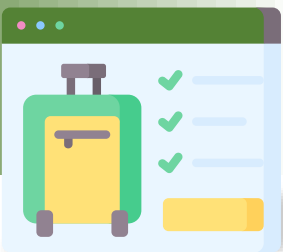
INSIGHT



Travellers **prefer booking all-inclusive packages**, allowing them to focus on the experience rather than the logistics



ACTION



- ✔ Promote all-inclusive packages through trusted travel trade partners, highlighting the **ease of booking**

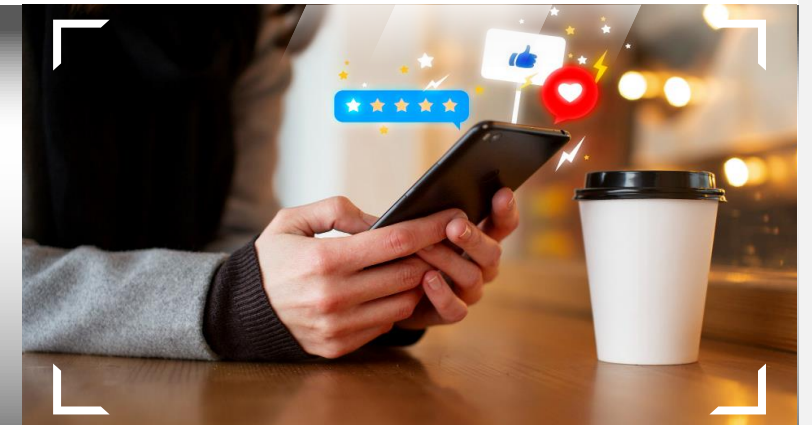
WHAT PLATFORMS AND CONTENT AREAS MATTER MOST?

SEGMENT K: JETSETTERS

INSIGHT



Travel related information is sought through **expert guidance, traveller reviews, and search-based exploration**. Travellers look for details on **destination experiences, travel routes, and transport options**



ACTION



- ✓ Highlight **expert-curated content** on platforms such as **Agoda, Booking.com, and MakeMyTrip** that showcases prominent experiences, key travel routes, and connectivity within the destination
- ✓ **Amplify authentic traveller reviews and high-quality listings** to build confidence in ease of movement, accessibility, and the overall travel experience at the destination



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Segment Personas

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Cross-segment
Analysis

WHAT IS COMMON/UNIQUE ACROSS SEGMENTS? (1/3)

COMMONALITIES

WHY DO THEY TRAVEL?

Across all segments, travellers seek destinations that offer **natural and scenic beauty** and prioritise **meaningful family moments** that deepen connections

Segments E and F, representing younger travellers, are driven by **fun, memorable experiences** and **vibrant shopping activities** when choosing their travel option

Travellers aged 30 and above (Segments B, D, and K) prefer **relaxation, escapism, and enriching experiences**



UNIQUE

Segment B

Motivated by cultural inspiration, discovering new places, and creating memorable experiences

Segment D

Motivated by adventure and the discovery of new destinations

Segment F

Seek adventure and thrilling outdoor experiences

Segment K

Enjoy fun activities and unique shopping experiences.





WHAT IS COMMON/UNIQUE ACROSS SEGMENTS? (2/3)

COMMONALITIES

WHEN DO THEY TRAVEL?

Destination is typically finalised **at least two months before the travel date.**

UNIQUE

WHEN DO THEY TRAVEL?

Segment B	AUGUST OCTOBER
Segment D	SEPTEMBER
Segment D & K	MAY
Segment E & F	JANUARY DECEMBER

Note: Segment B – Seasoned Explorers, Segment D – Family Adventurers, Segment E – Aspirational Explorers, Segment F – Scenic Adventurers, Segment K – Jetsetters

COMMONALITIES

HOW DO THEY TRAVEL?

Travellers across segments prefer to book **all-inclusive package tours**

UNIQUE

HOW DO THEY TRAVEL?

Segment E

Travelers also look for **packaged tours** alongside all-inclusive offerings



WHAT IS COMMON/UNIQUE ACROSS SEGMENTS? (3/3)

COMMONALITIES

WHAT MEDIA DO THEY ENGAGE WITH MOST?

Across segments, **social networking platforms and online information platforms** are key engagement channels, where travellers actively engage with creator content, peer posts, and shared travel experiences

KEY TOUCHPOINTS:

UNIQUE

Segment B & F

High engagement with mainstream **TV channels**

Segment B & E

Strong reliance on **user-generated video platforms**

Segment D, F & K

Preference for **paid digital entertainment platforms**

Segment B & F

Active users of **subscription music services**

COMMONALITIES

WHERE AND WHAT INFORMATION DO THEY SEEK?

Travellers seek information through **peer reviews and expert recommendations** on booking platforms such as **Tripadvisor and Booking.com**, as well as **search engines** like **Google and Bing**, alongside **AI-driven recommendations** from platforms such as **ChatGPT and Copilot**, and **social networking sites** including **Instagram and Facebook**

Major tourist attractions, travel routes, and transport facilities emerge as the key information needs for travellers

Tripadvisor

Booking.com

Google

Copilot

Instagram

UNIQUE

Segment K

Television plays a significant role in gathering information

Note: Segment B – Seasoned Explorers, Segment D – Family Adventurers, Segment E – Aspirational Explorers, Segment F – Scenic Adventurers, Segment K – Jetsetters



This segmentation booklet was developed by the Analytics and Insights Unit of SAT. It reflects SAT's commitment to evidence-based decision-making and to advancing a shared understanding of the tourism market.

The insights presented are grounded in robust, credible research methodologies.

This publication is shared with industry partners in the spirit of collaboration, with the aim of supporting informed strategies and contributing to the collective growth and sustainability of the tourism sector.

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