



*South Africa*

SOUTH AFRICAN TOURISM

# TRAVEL TRENDS

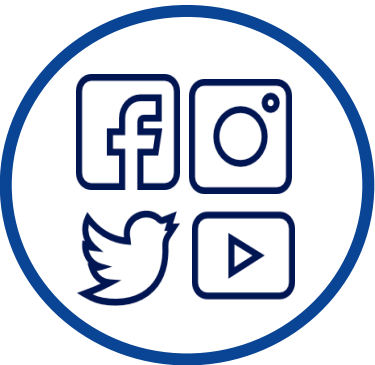


CONSUMER  
2019 -2022



SOUTH AFRICAN TOURISM

# CONSUMER SURVEY METHODOLOGY | 2019 -2022



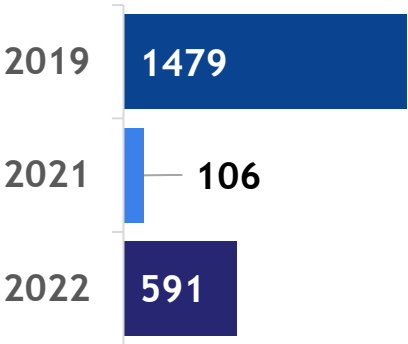
Survey deployed  
via promoted  
social media



Google Forms

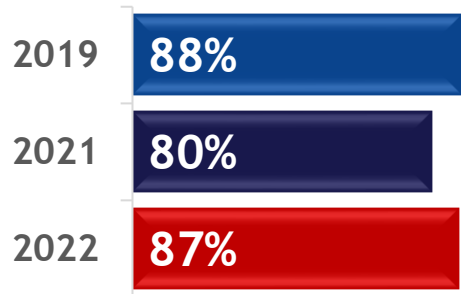


## RESPONSES



# CAMPAIGN AWARENESS 2019 -2022

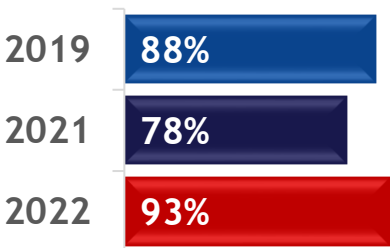
## AD/INFO RECALL



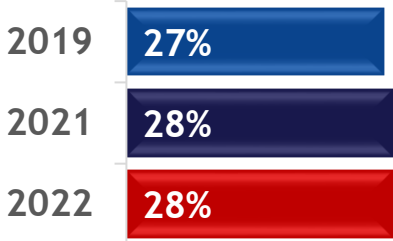
Percentage of respondents  
exposed to Travel  
marketing

## SOURCES OF AWARENESS

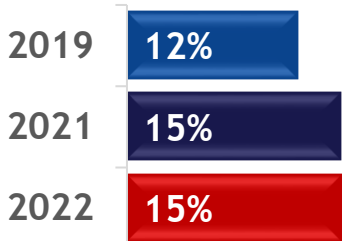
### Social Media



### Television

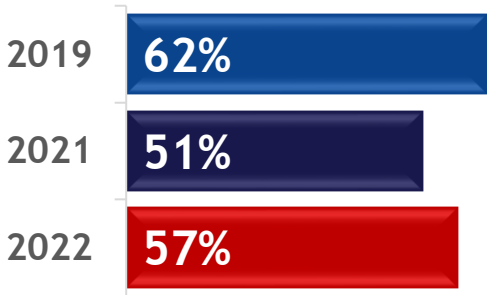
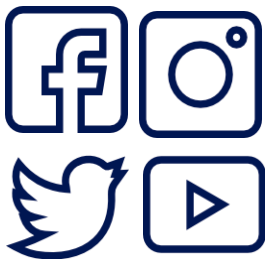


### Radio



# SOCIAL MEDIA ENGAGEMENT | 2019 -2022

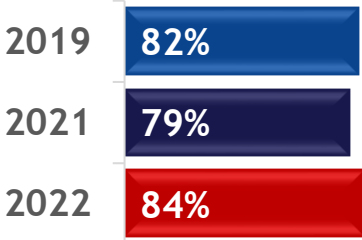
## ENGAGEMENT



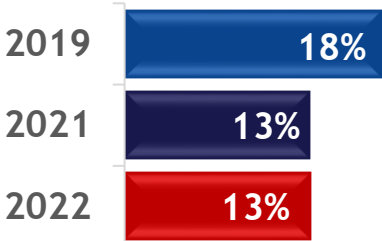
Percentage of the respondents said they engaged platforms during Travel

## ENGAGEMENT PLATFORM

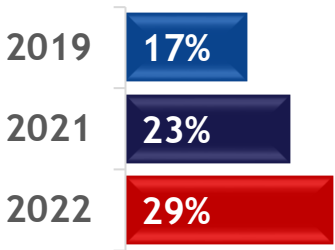
Facebook



Twitter

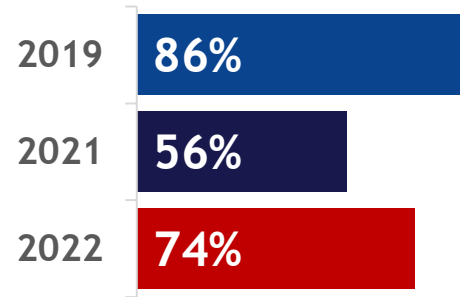
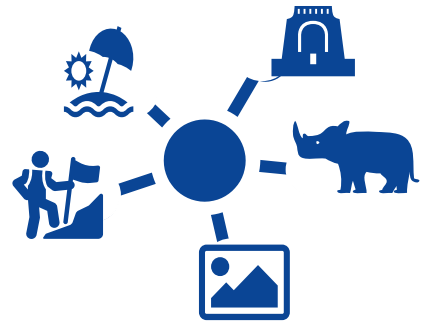


Instagram



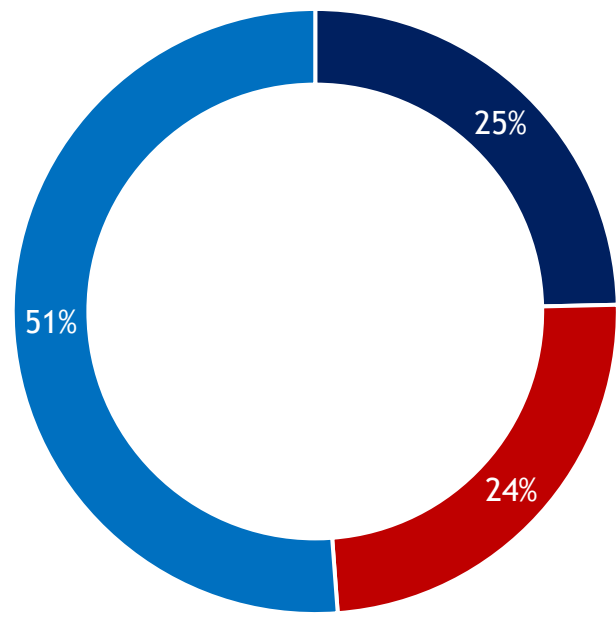
# INTEREST: TRAVEL PACKAGES | 2019 -2022

## INTEREST: TRAVEL WEEK PACKAGES



Percentage of the respondents said they were interested in products or packages

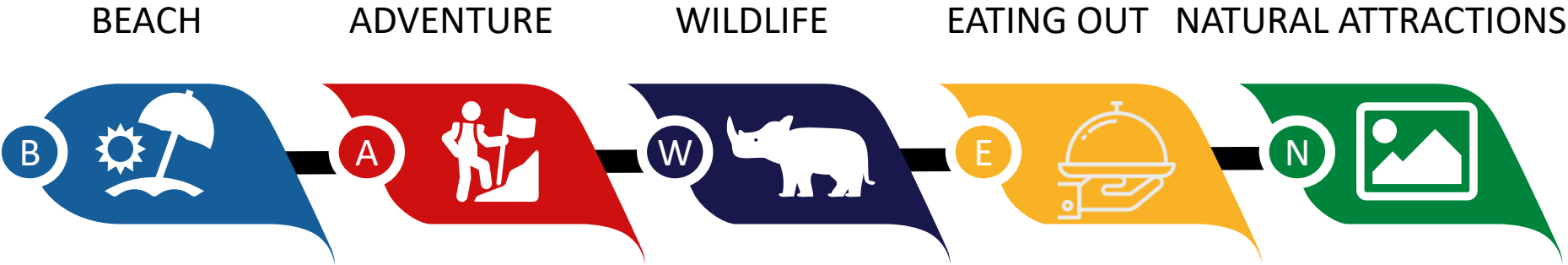
## DEALS BUDGET FRIENDLY?



■ Did not check prices ■ No ■ Yes

# INTEREST: ACTIVITIES | 2019 -2022

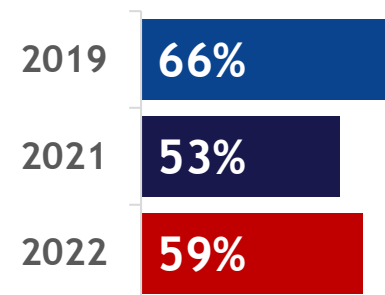
## TOP 5 ACTIVITIES



|      |     |     |     |     |     |
|------|-----|-----|-----|-----|-----|
| 2022 | 47% | 49% | 45% | 41% | 33% |
| 2021 | 66% | 66% | 52% | 43% | 50% |
| 2019 | 59% | 52% | 47% | 45% | 43% |

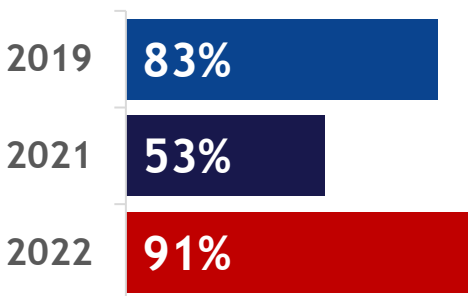
# TRAVEL: PLATFORM EXPERIENCE | 2019 -2022

## VISITED WEBSITE



Percentage of the respondents said visited the website

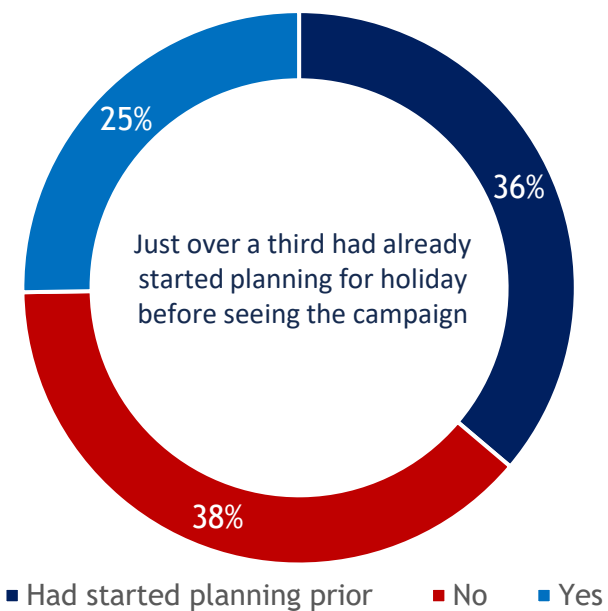
## WEBSITE NAVIGATION



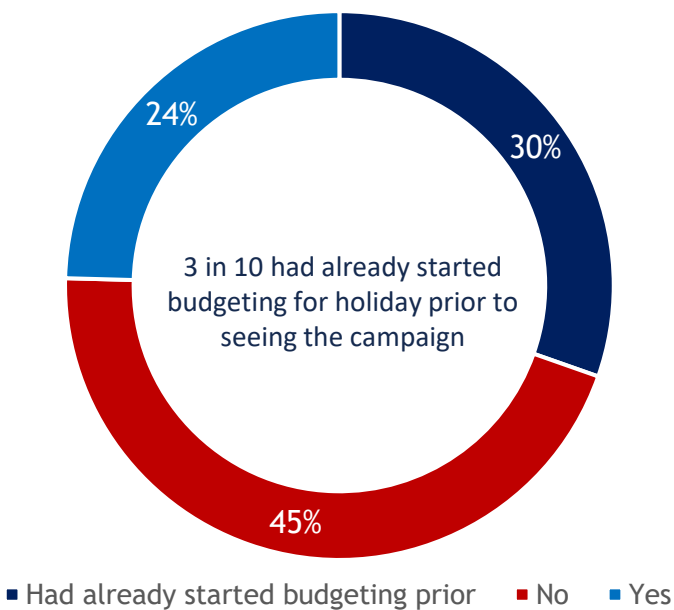
Percentage of the respondents said the website was easy to navigate

# TIMEFRAMES | 2019 - 2022

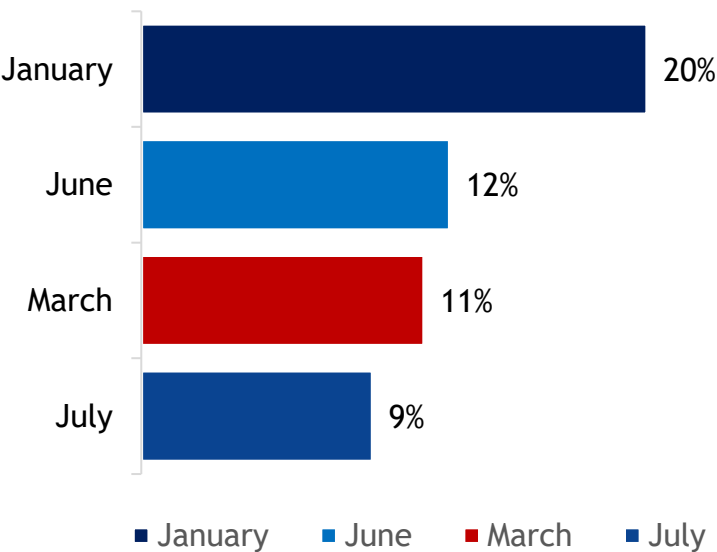
## PLANNING 2022



## BUDGETING 2022

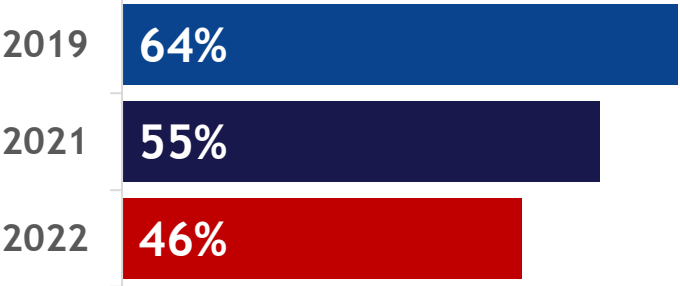


## PREFERRED TIMING FOR ADVERTISING 2022



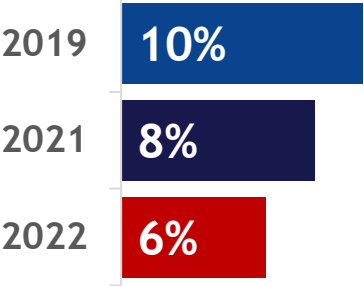
# PRICING AND BOOKING RATE | 2019 -2022

## DEALS PRICING



Percentage of the respondents said the pricing of the deals were within their budget

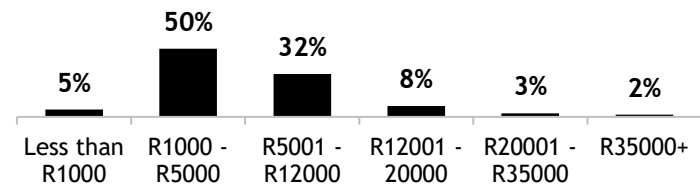
## TRAVEL BOOKING



Percentage of the respondents said they booked

# CONSUMER PREFERENCE | TRAVEL ITENERARY | 2022

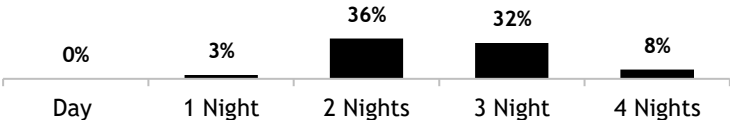
DOMESTIC TRAVEL BUDGET\* 2022



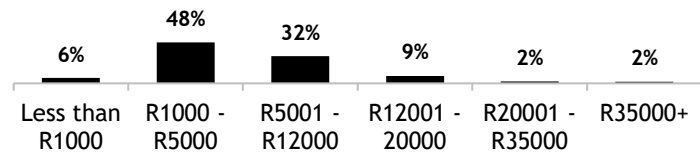
TRAVEL PARTY\* 2022



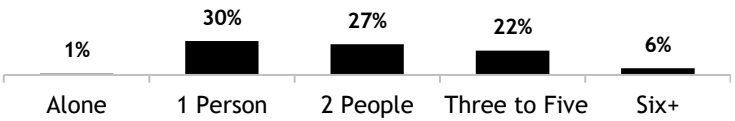
PREFERRED # OF NIGHTS\* 2022



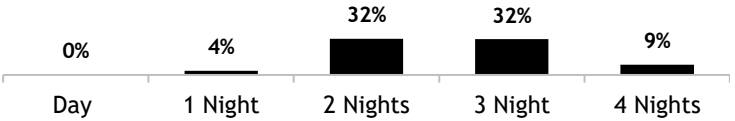
DOMESTIC TRAVEL BUDGET 2022



TRAVEL PARTY 2022



PREFERRED # OF NIGHTS 2022



# CONSUMER PREFERENCE | TRAVEL ITENERAY | (1/2) 2022

## PREFERRED PROVINCES 2022

| Province      | 2019 | 2021 | 2022 |
|---------------|------|------|------|
| Eastern Cape  | 21%  | 21%  | 17%  |
| Free State    | 6%   | 21%  | 12%  |
| Gauteng       | 20%  | 22%  | 19%  |
| KwaZulu Natal | 42%  | 38%  | 31%  |
| Limpopo       | 15%  | 24%  | 20%  |
| Mpumalanga    | 44%  | 48%  | 34%  |
| North West    | 17%  | 22%  | 15%  |
| Northern Cape | 7%   | 14%  | 9%   |
| Western Cape  | 35%  | 27%  | 30%  |
| National      | 21%  | 21%  | 11%  |

## PREFERRED DEALS & PACKAGES

- Adventure
- Bela Bela
- Cape Town
- Discounted packages
- Drakensberg
- Family Packages
- Mpumalanga
- Outdoors / Hiking
- Natural Attractions
- Safari / Bush / Wild Life
- Weekend Getaway
- Whale Watching
- Group Activities



## RECOMMENDED CHANGES

“

Advertise early, advertise more often, include hidden gems and lesser known areas/destinations

*“I would like to get reminders of the shot let packages almost every month”*

*“I wish would advertise traveling offers much earlier atleast from May or July”*

*“More visibility or campaigns especially to lower income groups or townships. Have tourism offices in townships or malls”*

*“Not be for a limited period, as people have different off days! Maybe it should run all year round so it caters for everyone”*

“

Include varied packages that cater for families, also include specials for school holidays

*“More specials during school holidays”*

*“More kids oriented trips I have twins and only travel with them”*

*“Family friendly deals, more houses and stop charging per person”*

## RECOMMENDED CHANGES



“

Lift up content on social media platforms and on website to be more engaging

*“Post more Pictures and videos to make us the viewers to be eager to book ”*

“

Include packages that are cost effective across varied income quantiles

*“Just more realistic getaways would be appreciated. Everyone loves a break every now and then but when marketing you have to range between all salary brackets ”*

*“You should consider having affordable prices for south Africans to encourage them to explore their country. Some packages are far more expensive than Thailand packages”*

“

Channels

*“Should try and broadcast their travel in radio to reach a huge target population”*

*“Radio is the best place for some of us”*



TRADE  
2019 -2022



SOUTH AFRICAN TOURISM

# TRADE SURVEY METHODOLOGY | 2019 -2022



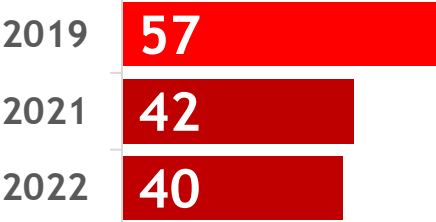
Survey deployed via promoted email to 321 partners



Google Forms



## RESPONSES



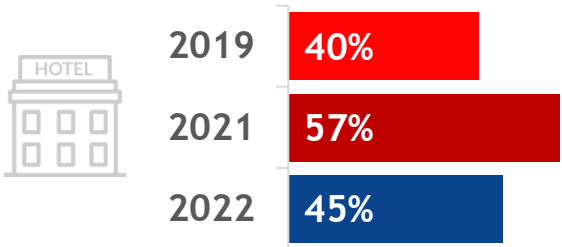
# COMPANY PROFILE | 2019 -2022

## PROVINCIAL DISTRIBUTION

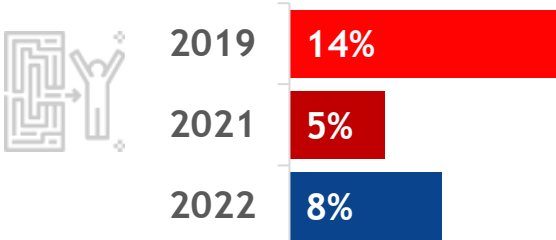
| Province      | 2019 | 2021 | 2022 |
|---------------|------|------|------|
| Eastern Cape  | 11%  | 10%  | 8%   |
| Free State    | 0%   | 2%   | 10%  |
| Gauteng       | 23%  | 24%  | 23%  |
| KwaZulu Natal | 16%  | 17%  | 25%  |
| Limpopo       | 7%   | 7%   | 3%   |
| Mpumalanga    | 18%  | 14%  | 3%   |
| North West    | 16%  | 14%  | 5%   |
| Northern Cape | 0%   | 2%   | 3%   |
| Western Cape  | 44%  | 43%  | 23%  |
| National      | 12%  | 5%   | 8%   |

## TYPE OF BUSINESS

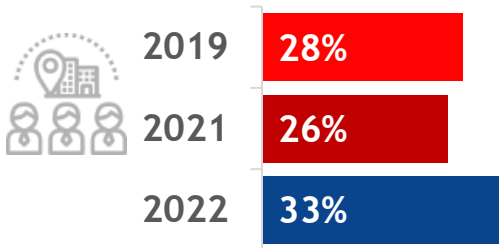
### Accommodation



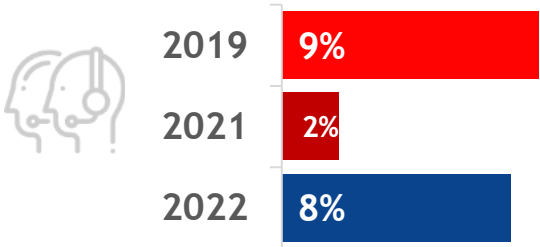
### Experience



### Tour operator



### Travel agent

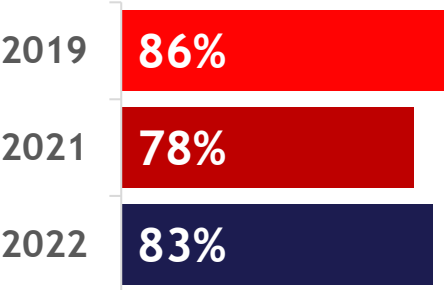


### Other



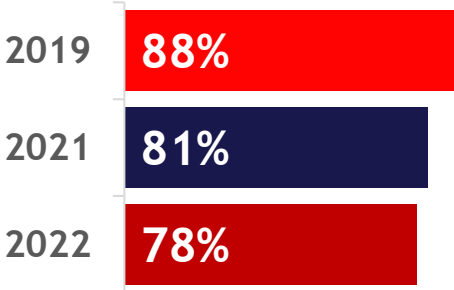
# SIGNING UP PROCESS | 2019 -2022

## REGISTRATION



Percentage the respondents said they found the platform easy use

## LOADING



Percentage the respondents said they loaded deals

# Marketing exposure | 2019 -2022

## EXPOSURE



2019

51%

2021

60%

2022

63%

Percentage of respondents  
were exposed to Travel  
Week marketing

## SOURCES OF AWARENESS

Social Media



2019

33%

2021

36%

2022

50%

Television



2019

18%

2021

19%

2022

18%

Radio



2019

16%

2021

19%

2022

25%

# Toolkit | 2019 -2022

## TOOLKIT



2019 51%

2021 71%

2022 40%

Percentage the respondents that said they used the toolkit

## RECOMMENDED CHANGES

More online visibility across key search engines and channels

“

*“that Google is used so that these deals appear when people are searching much like the online website that appear on the side when you search a property”*

Share updated content, and do training ahead of time

“

*The initial toolkit that was sent out was actually outdated. Additionally, the Travel Week clinics are held way too close to Travel itself and I suggest it is held a few more weeks prior because it is a lot of very helpful information and after those sessions, as businesses we require time to fully process and digest all that information.*

System malfunction

“

*the links did not work - website crashed*

# Future sign up| 2019 -2022

## FUTURE PARTICIPATION



2019

88%

2021

91%

2022

92%

Percentage of the respondents said that they would participate in the campaign again

## REASON

“

Travel is great marketing tool for businesses

*It's an opportunity to market the company and provide exposure to the local market. A chance to create new contacts and to make SA Travellers aware of the services and experiences they can enjoy locally.*

“

There is always value in being visible on such a platform

*Unless you try to market through all available channels the business will not succeed. This year we did not make any sales however last year we did. and there is always some marketing value just being listed*

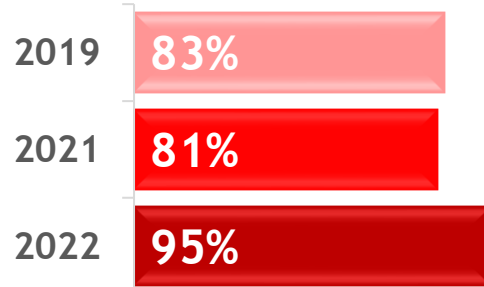
“

Opportunity to improve offering and increase sales

*Each year we can improve our offering to increase sales, but it is important to just be visible and participate in domestic tourism campaigns, even if no sales are generated.*

# Recommend participation | 2018 -2021

## RECOMMEND



Percentage of the respondents said that they would recommend participation in the campaign

## REASON

“

The platform offers great opportunity for businesses to market their products

*“Any platform that is related to the Tourism Sector there is great opportunity for us Tour Operators especially when it comes to marketing.”*

*“The website has many leads towards growth for a business”*

“

Platform for growing the domestic market

*“Unless you try to market through all available channels the business will not succeed. This year we did not make any sales however last year we did. and there is always some marketing value just being listed”*

*“It's a great campaign for Trade partners in various sectors to sell their products to travellers and local operators.”*

“

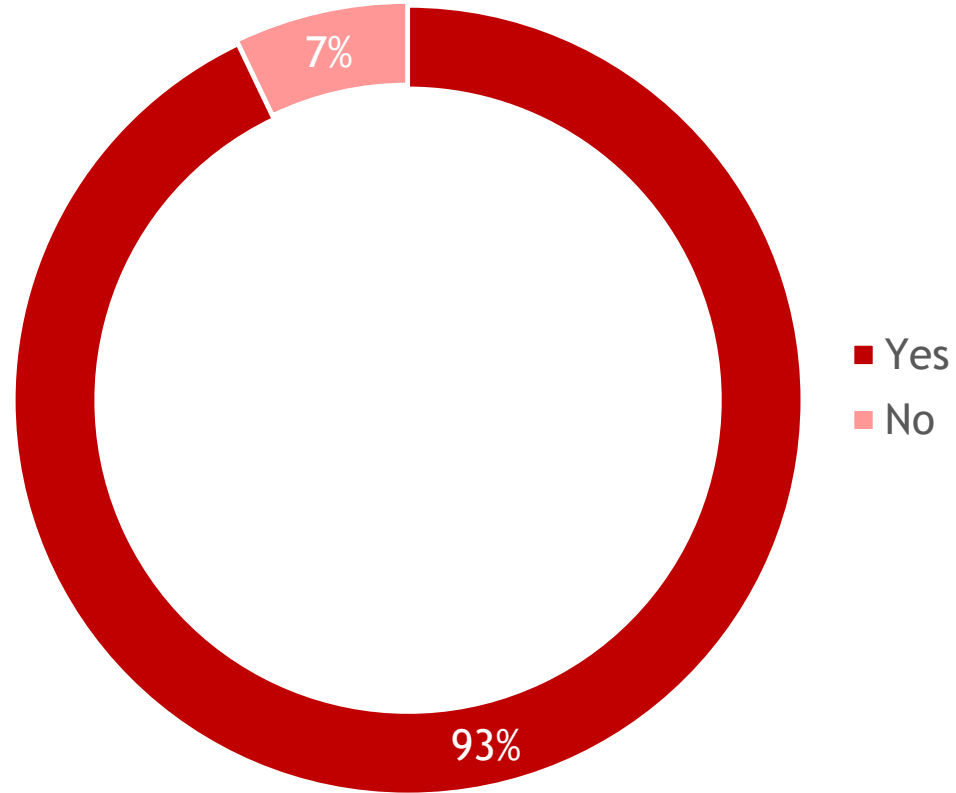
Product Salience/Visibility

*“I recommend this to all as a mean to increase visibility and hopefully strengthen the relationship with SAT”*

*“The more we get smmés enrolled in the program the more we get people to rethink the sector. This program adds value to much....”*

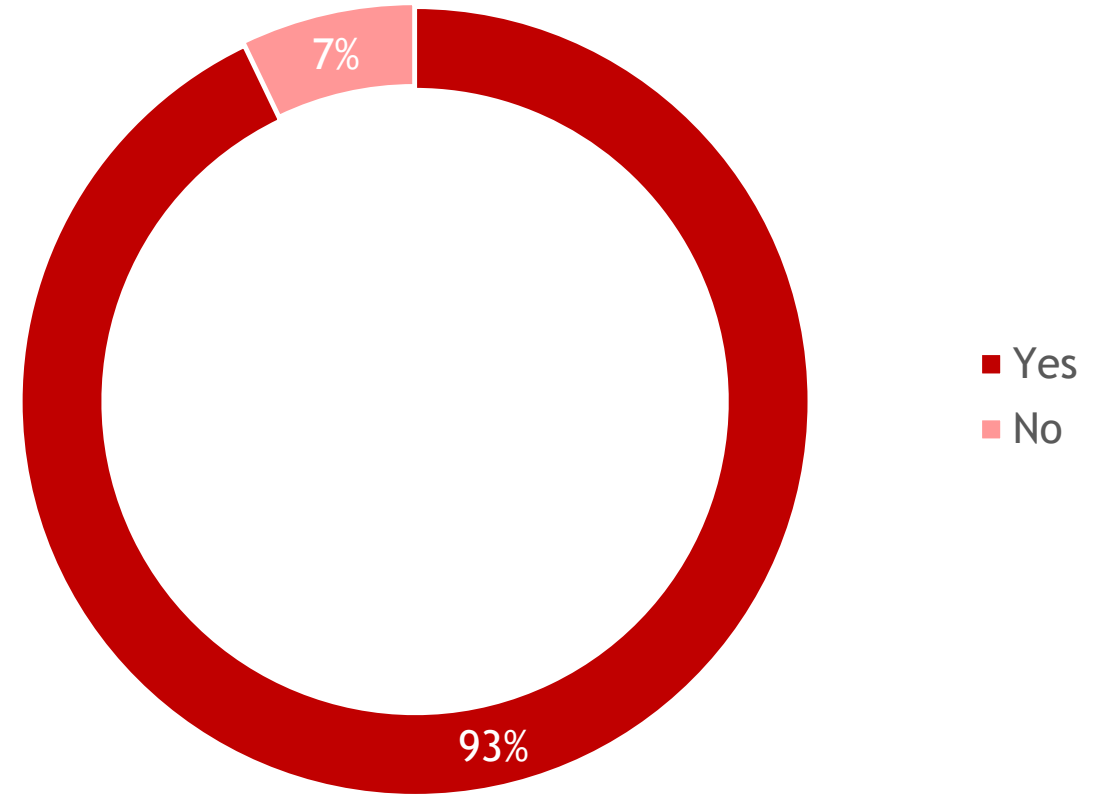


## OTHER CAMPAIGNS 2021



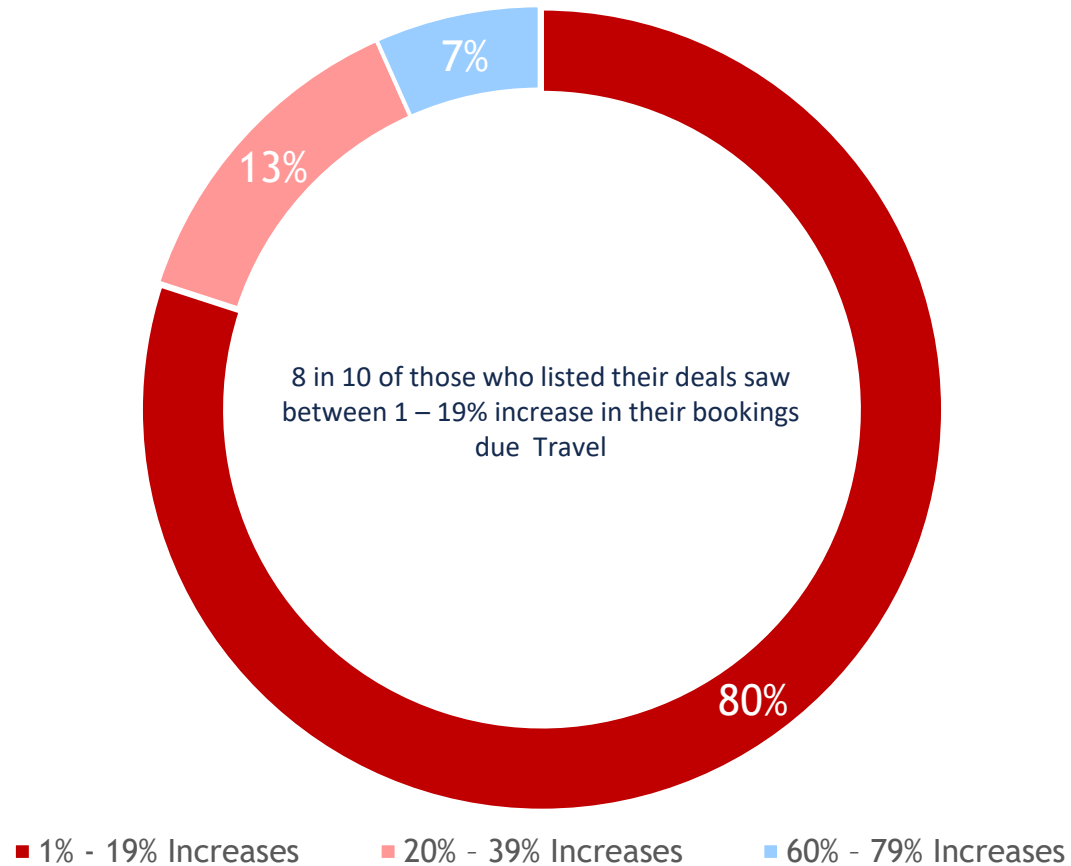
Would participate in other  
campaigns

## OTHER CAMPAIGNS 2022



Would participate in other  
campaigns

## BOOKINGS IMPACT 2022



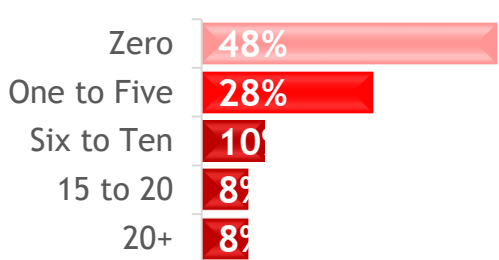
Increases in bookings

# Deals type | 2019 -2022

## Inquiries



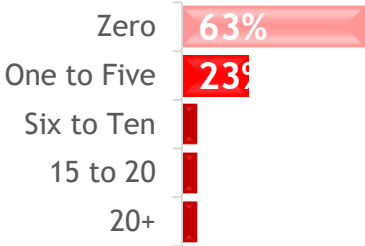
### Number of Eenquiries



## Deals



### Number of deals



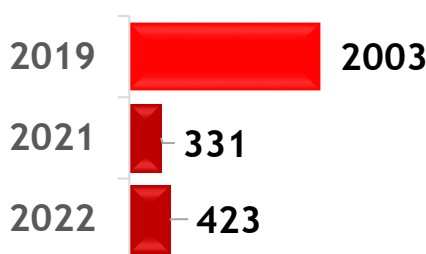
## Total value



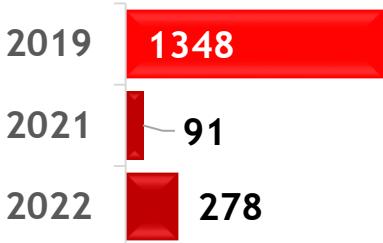
### Range



### Absolute number



### Absolute number



### Estimated value

