



SOUTH AFRICAN TOURISM

DOMESTIC TOURISM SURVEY
26 JULY 2023

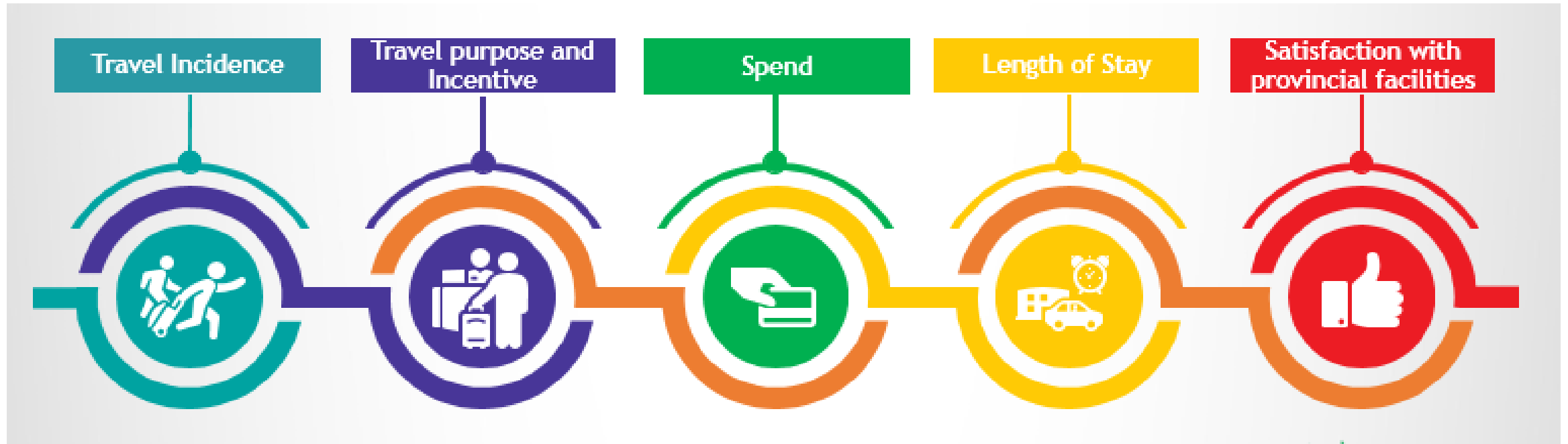
VISIT
SOUTH AFRICA

Purpose and background of the study

- South African Tourism (SAT) strives to improve the quality of tourism in South Africa. As part of this, SAT has been measuring and tracking domestic tourism from a demand side, on a monthly basis through the Domestic Tourism Survey (DTS) since 2007.
- The DTS measures the value and volume of domestic tourism; specifically
 - ✓ travel patterns
 - spend patterns
 - number of domestic trips taken
 - bed-nights
 - day trips
 - distance of trips undertaken
 - the frequency and seasonality of trips
 - the number of people who travel and
 - the reasons for taking trips and travel within and across provinces and geographical areas.
- These travel patterns are compared at a national level and across the nine provinces.
- SAT uses the research findings at a strategic level to improve the quality of domestic tourism within South Africa and to help its stakeholders enhance their respective tourism strategies.

Objectives of the study

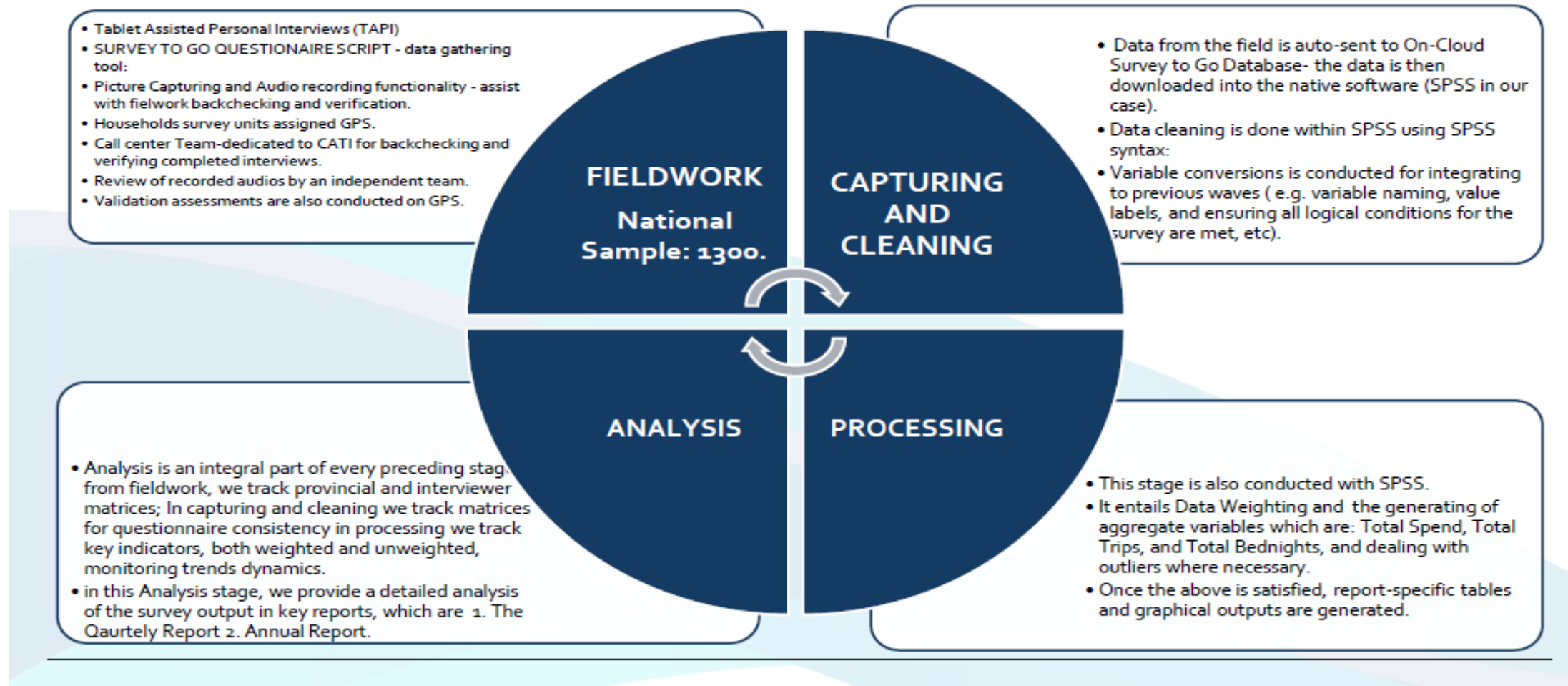
The research is meant to establish, among other aspects, the following:



Survey Methodology



Data collection - Data analysis process flow



Field Issues - June 2023

Meeting of quotas

- The target sample of 1300 interviews were successfully achieved during the field month of June 2023.
- The required quotas for each province were met.

Field Issues

- There was a need to substitute some of the EAs due to several reasons.
- We had challenges with completion of the quota for Eastern Cape due to interviewer transport logistics.

Questionnaire adjustments

- There were no questionnaire adjustments for Wave 194.








SOUTH AFRICAN TOURISM

Latest Domestic Tourism Performance Q1 2019 - Q1 2023







Domestic Key Measures: January - March 2023

January to March of 2023 saw overnight trips exceed pre-pandemic levels as well as 2022 levels by 41,0%. Overnight domestic spend was also up 24,4% compared to Q1 2022. Average overnight spend was down 11,7% signifying that South Africans took more frequent trips and spent less. The total number of nights spent away from home reached 27,9 million and this was a 32,9% increase over the same period in 2022, the average length of stay per trip fell by 5,7% highlighting the global trend that travelers now opt to take shorter and more frequent trips than before.

Key measure	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	%Δ Q1 2023 over Q1 2022
 Domestic Overnight trips (Mn)	4,8	4,7	2,7	6,2	8,7	41,0%
 Domestic Overnight spend (Bn)	R8,2	R9,0	R8,1	R18,9	R23,5	24,4%
 Average domestic spend	R1,694	R1,890	R3,008	R3,050	R2,692	-11,7%
 Total Bed nights (Mn)	18,5	11,9	9,8	21,0	27,9	32,9%
 Average Length of stay	3,8	2,5	3,7	3,4	3,2	-5,7%

Domestic Key Measures: January - March 2023

Domestic holiday trips from January to March 2023 were up 40,5% to reach 2,4 million. These holiday trips represented a 27,0% share of total overnight trips. The expenditure from holiday trips (R9,5 billion) accounted for 40,3% of total spend and drove the strong spend results in quarter 1 of 2023, this was a 19,9% increase over quarter 1 of 2022. There was a 12,3% increase in MICE trips taken during January and March 2023. Day trips grew by 26,9% to reach 44,7 million in quarter 1 of 2023.

Key measure	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	%Δ Q1 2023 over Q1 2022
 Overnight Holiday trips (Mn)	1,1	1,4	0,5	1,7	2,4	40,5%
 Overnight Holiday spend (Bn)	R3,3	R4,8	R1,6	R7,9	R9,5	19,9%
 Overnight MICE trips (Mn)	0,2	0,2	0,2	0,3	0,3	12,3%
 Day trips (Mn)	34,9	39,5	21,5	35,2	44,7	26,9%

Domestic Performance and Insights

	Q1 2022	Q1 2023	
Total Overnight Trips	6 203 151	8 745 358	Green
Total Spend	R 18 922 250 956,73	R 23 547 750 668,95	Green
Average Spend	R 3 050,43	R 2 692,60	Red
Bednights	20 993 631	27 905 387	Green
LOS	3,4	3,2	Red
Holiday Overnight Trips	1 680 189	2 360 806	Green
Total Holiday Spend	R 7 913 349 456,90	R 9 488 223 170,02	Green
Day trips	35 231 586	44 695 576	Green
MICE trips	287 556	322 955	Green

Q1 performance: overall total trips and holiday trips have seen an increase in Q1 2023 compared with the same period in the previous year. Average spend (down by 11,7%) and length of stay has declined but the subsequent increase in arrivals compensated for this and total spend has increased to R23.5 billion. Both day trips and MICE trips has seen an increase in this quarter.

Economic performance: The domestic market is experiencing a decline in economic performance with declining GDP. Consumer price inflation continues to move upwards, inflicting more strain on household budgets.

Drivers of Domestic travel - Domestic travellers travel mostly for visiting friends and relatives, followed by holiday.

Province visited - The top three provinces visited were Gauteng, Limpopo and Eastern Cape. Fewer trips were taken to Northern Cape.

Spend: The average spend for domestic travel in Q1 of 2023 was R2,692. This average spend was higher than 2019 (R1,649) but lower than 2022 (R3,050).

South African tourism predominantly focus on three segments in the domestic market, build, convert and defend. The research insights from these three segments outlined below (Feb 2023).

For these three segments; 'Go for a vacation', 'Watch movies/TV shows' and 'Dine out at restaurants' are the top three preferred recreational interests. To 'Shop for personal use' replaces 'Watch movies/ TV shows' in top three preferred recreational interests when budget constraints are removed.

88% of travellers within the above segments are willing to go for a vacation in the next 12 months; while 'Exploring beautiful scenery' and 'Relax at beach' are the most considered reasons; 'Other higher priority expenses' and 'Health issues' are the key reasons to not consider travelling

When planning a holiday trip, travellers prefer to research the destination and feel travelling is a great way to learn. They feel travelling is a great way to learn about different cultures and choose destinations that offer a variety of activities. Most prefer to plan their own trips over the Internet rather than meeting with a travel agent.

When choosing activities, 'Beaches and coastlines', 'Nature, breath-taking landscapes' and 'City Life and Entertainment' are the most considered experiences.

Overall, travellers rely on 'Recommendations from friends or family' and 'Social media', while selecting their destination; half of the travellers in these segments use 'Online travel aggregators' for making their travel bookings

'Social media' and 'In-person/telephonic conversation' continue to be the most preferred channels to share experience during and after a trip. The preferred month of travel are April September and December.

'Social media' continues to be the most popular source to get travel-related information among travellers travelling within South Africa, distantly followed by 'TV channels' & 'Online news, emails, etc.'

Dissemination platform

www.southafrica.net/gl/en/corporate

The screenshot shows a web browser displaying the URL <https://www.southafrica.net/gl/en/corporate>. The page features a large banner image of a vineyard with a house in the background. Overlaid on the banner is the text "TOURISM TUESDAYS" in large, colorful letters, followed by "JOIN THE CONVERSATION" and "#TourismTuesdays". A red button labeled "Tourism Tuesday" is positioned in the bottom right of the banner area. Below the banner is a navigation bar with a "QUICK LINKS" section containing several items: Leadership, Media centre, Annual Report, Tourism Tuesday, Research (circled in black), and Vacancies. The South African Tourism logo is visible in the top left corner, and a search bar is located in the top right.



VISIT
**SOUTH
AFRICA**