

Sho't Left.

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SOUTH AFRICAN TOURISM





UNLOCKING THE  
**DOMESTIC MARKET**

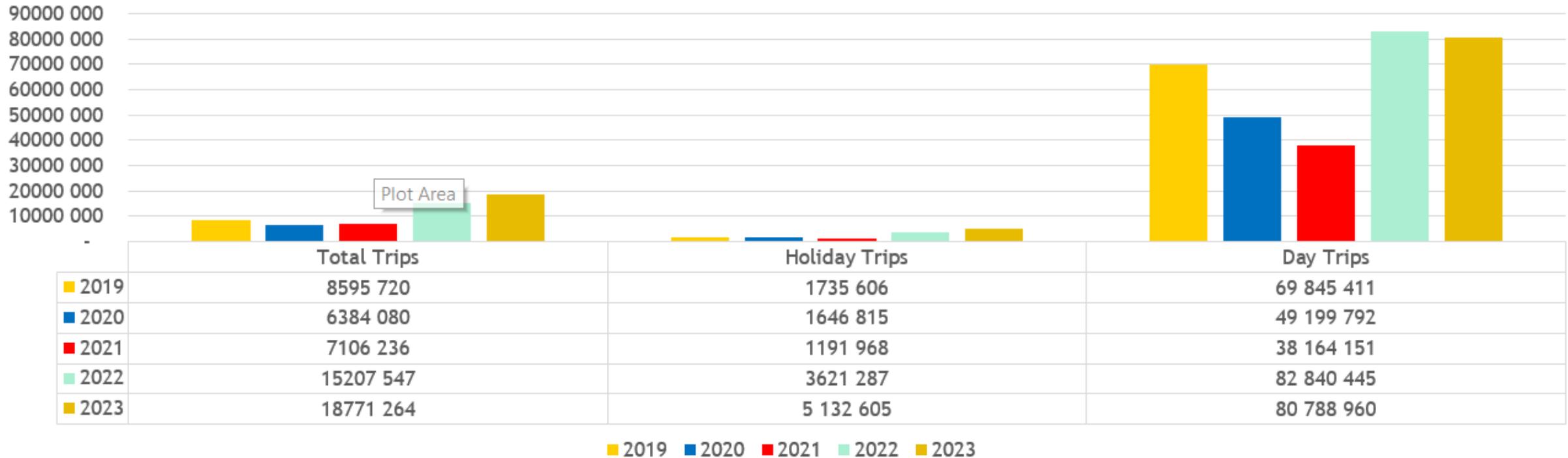


SOUTH AFRICAN TOURISM

# January to June Trips

Domestic Trips Target	2023
Total Trips	26 780 437
Holiday Trips	8 068 498
Day Trips	149 725 359

## Domestic Trips Performance - Jan to June

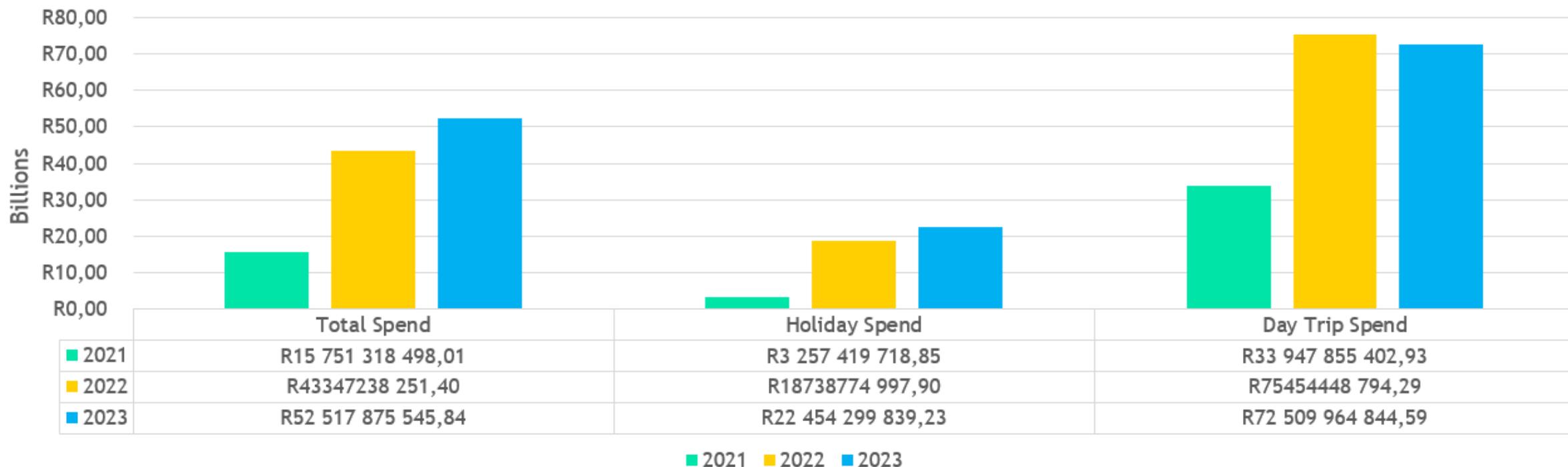


- There is a 23% increase in the total trips from January to June, as compared to the same period last year.
- Holiday trips have increased by 42%.
- Day trips have seen a decline of 2.5%. Day trips have seen a steady decline since March, however still tracking above pre-COVID levels. Initiatives will be put in place to grow day trips numbers, especially through the Summer Campaign.
- We are on track to exceed total and holiday trips targets, and to meet the day trips targets.

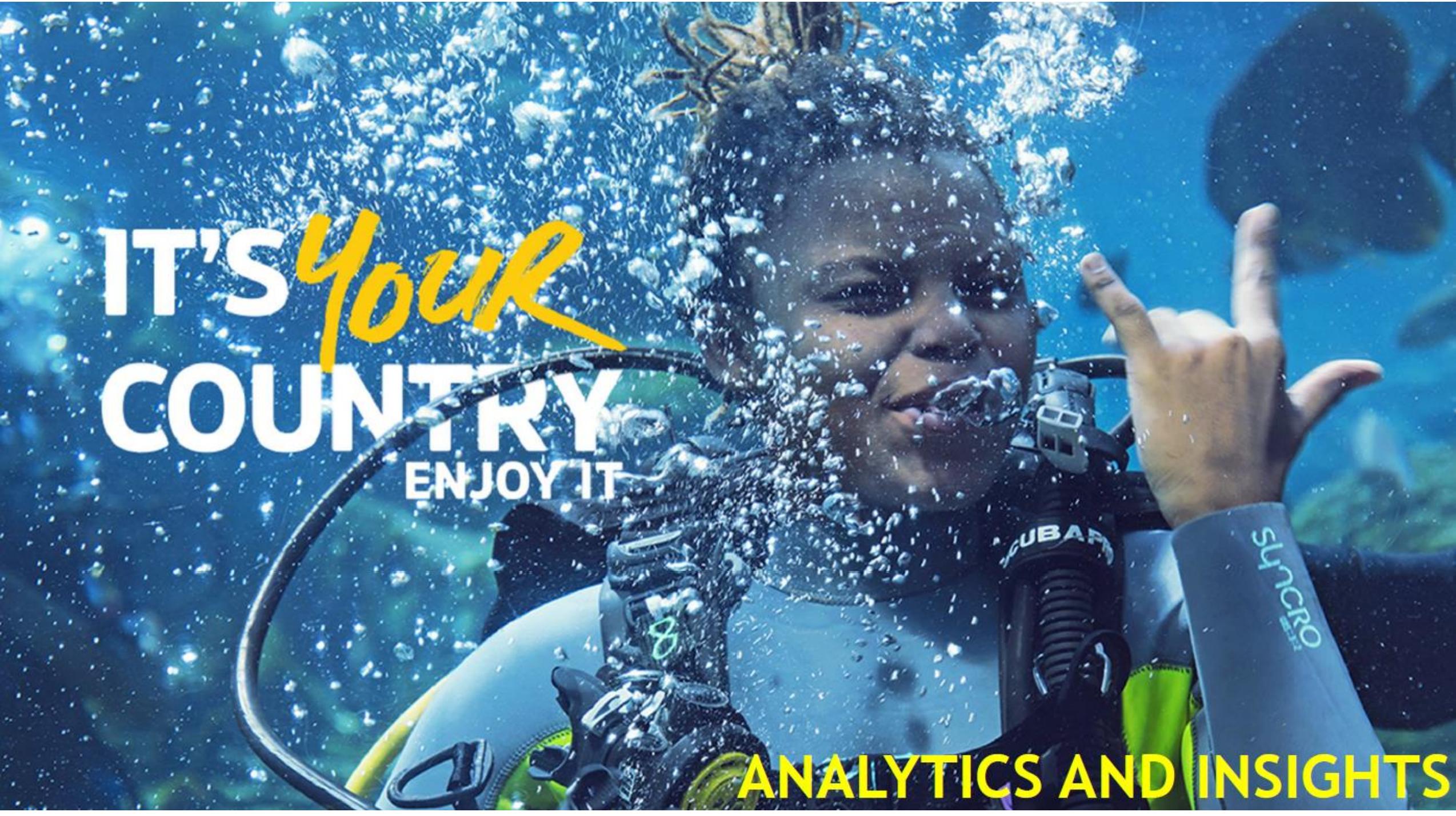
# January to June Spend

Spend Target	2023
Trips	R 82 761 727 701,57
Holiday	R 24 934 725 590,70
Day Trips	R 130 057 435 774,23

## Domestic Spend - Jan to June



- Total spend has increased by 20% from January to April, as compared to the same period last year.
- Holiday spend increased by 14%.
- Day trip spend increased by 10%.



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ANALYTICS AND INSIGHTS

# THE SOUTH AFRICAN DOMESTIC CONSUMER BASE CAN BE SPLIT INTO THREE MARKETS:



THE **DEFEND** MARKET  
**370 000 PEOPLE**  
regular local travellers  
from **HIGHER INCOME BRACKETS.**



THE **CONVERT** MARKET  
**1.1M PEOPLE**  
travelling not  
necessarily for  
holidays/leisure.  
**GROWING MIDDLE CLASS.**



THE **BUILD** MARKET  
**2.7M PEOPLE**  
earning enough to  
be local tourists, but  
do not have a culture  
of travel. This is our  
**EMERGING 1ST TIME TRAVEL SEGMENT.**

SA TOURISM, DOMESTIC TOURISM RESEARCH 2016



SLIGHT  
CHANGE POST  
COVID

LOOKING FOR  
EXPERIENCES

PLAN THEIR  
TRIPS AROUND  
EVENTS

INFLUENCED  
BY WORD OF  
MOUTH



SOUTH AFRICAN TOURISM

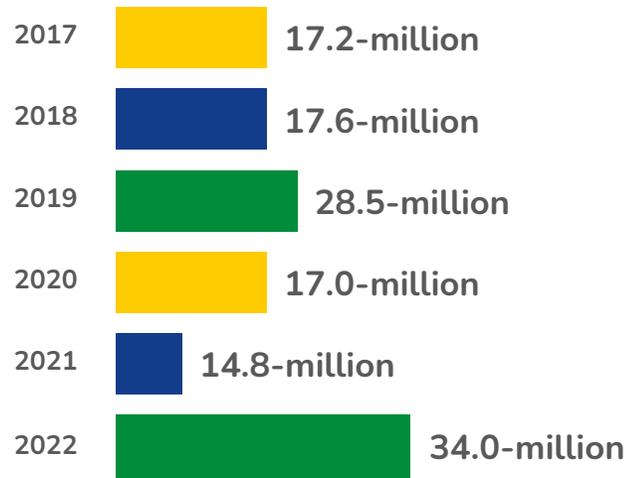
## Domestic trips



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

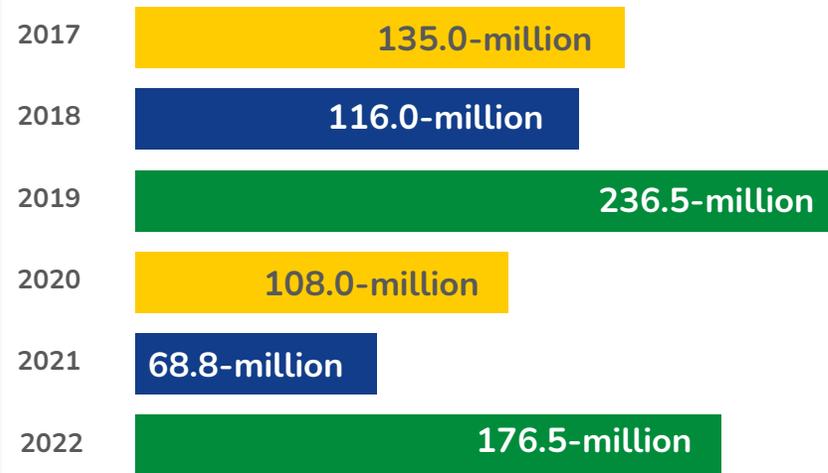
### Overnight trips (longer than a day)

Actual trips:



### Day trips

Actual trips:

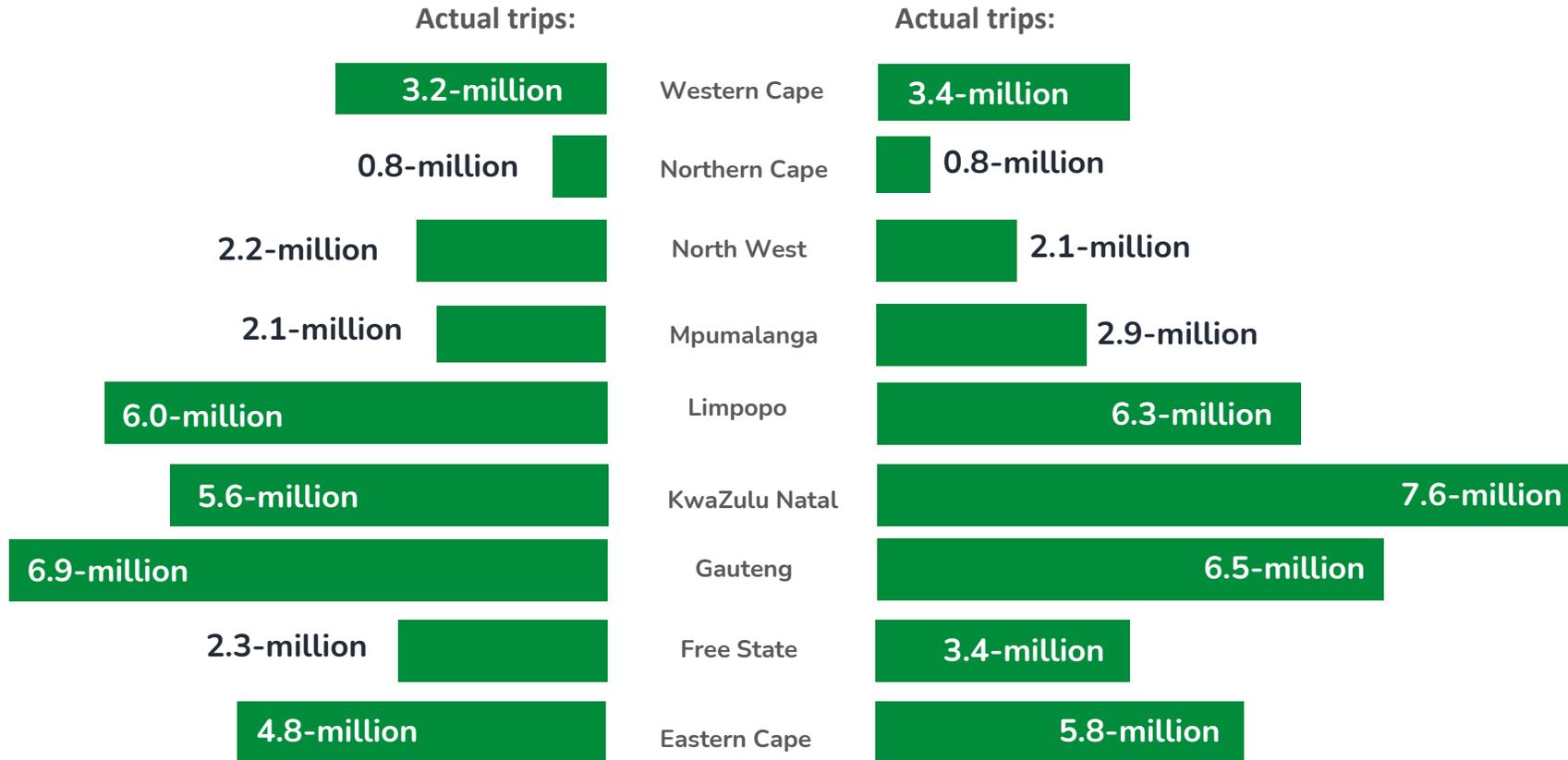


# Domestic trips

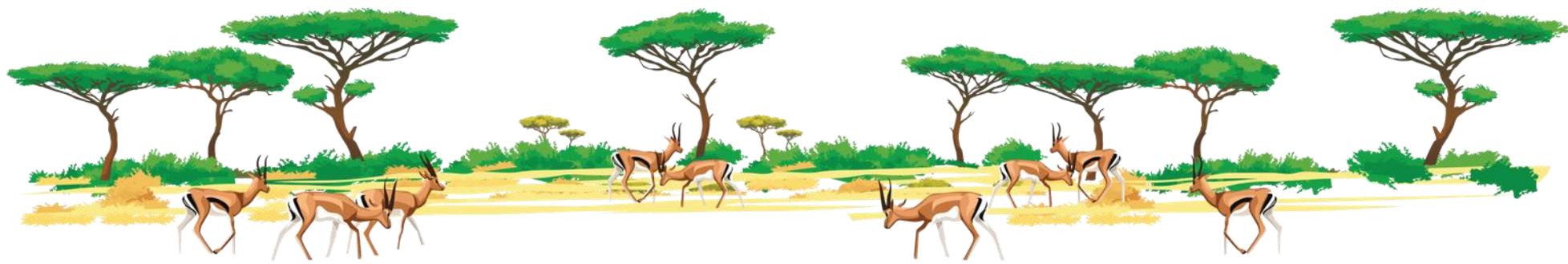
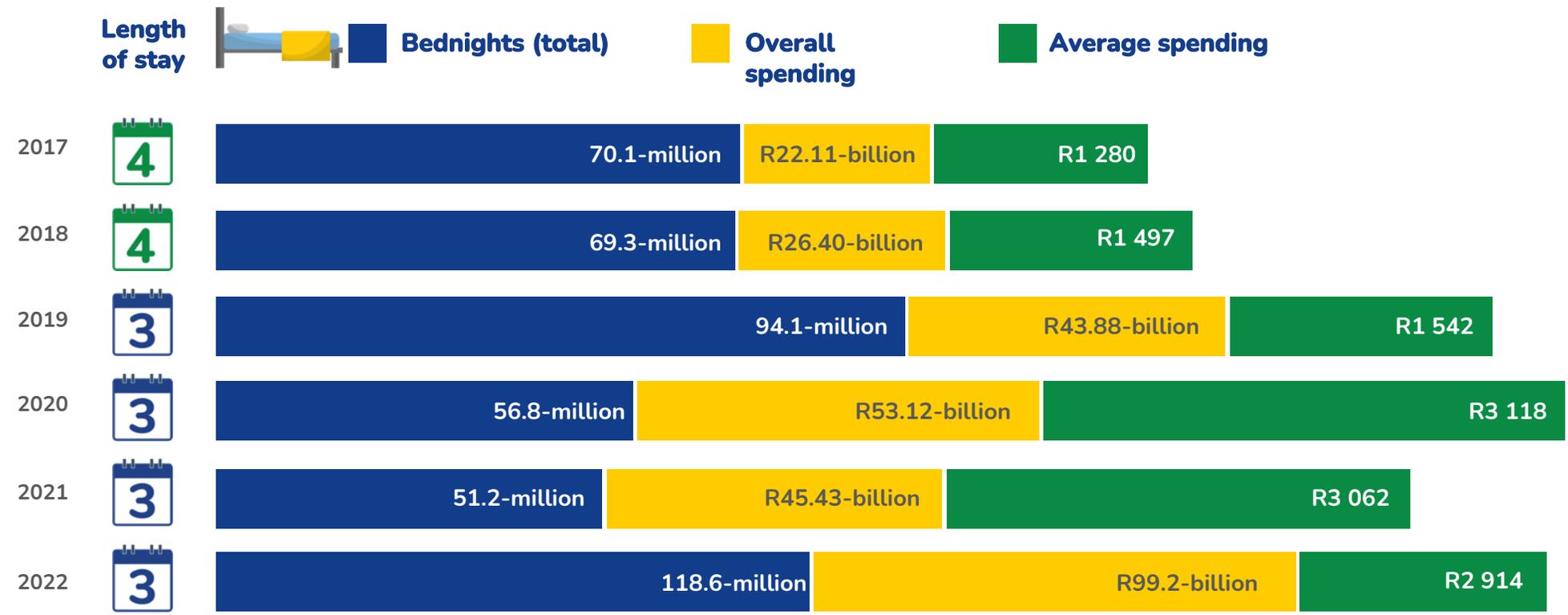


## Source Province

## Destination Province



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



Source: SAT Domestic Survey 2022 (January – December)

# How do South Africans plan their trips?



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

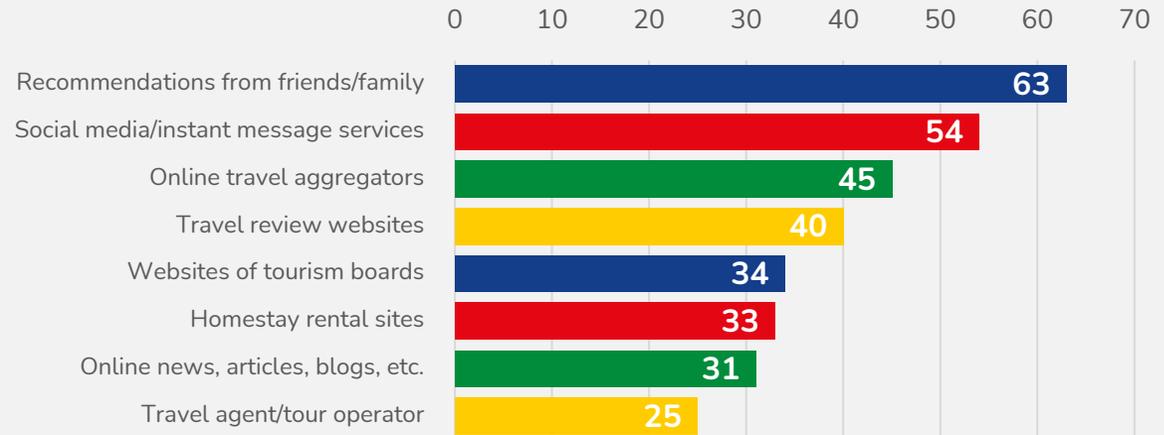


Nearly half use **online travel aggregators** to make their travel bookings

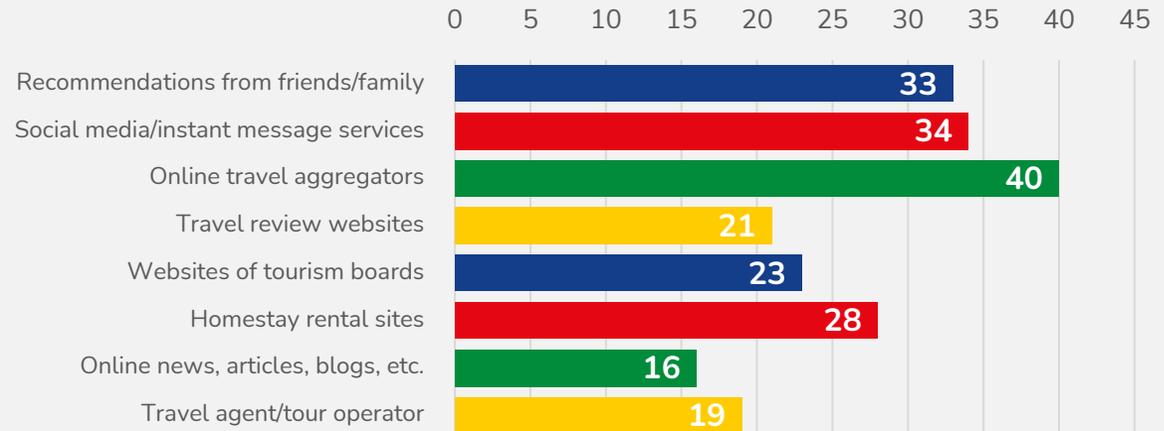


Source: SAT Domestic Lifestyle and Brand Tracking

## Channels used when researching a trip



## Channels used/referred to when booking a trip

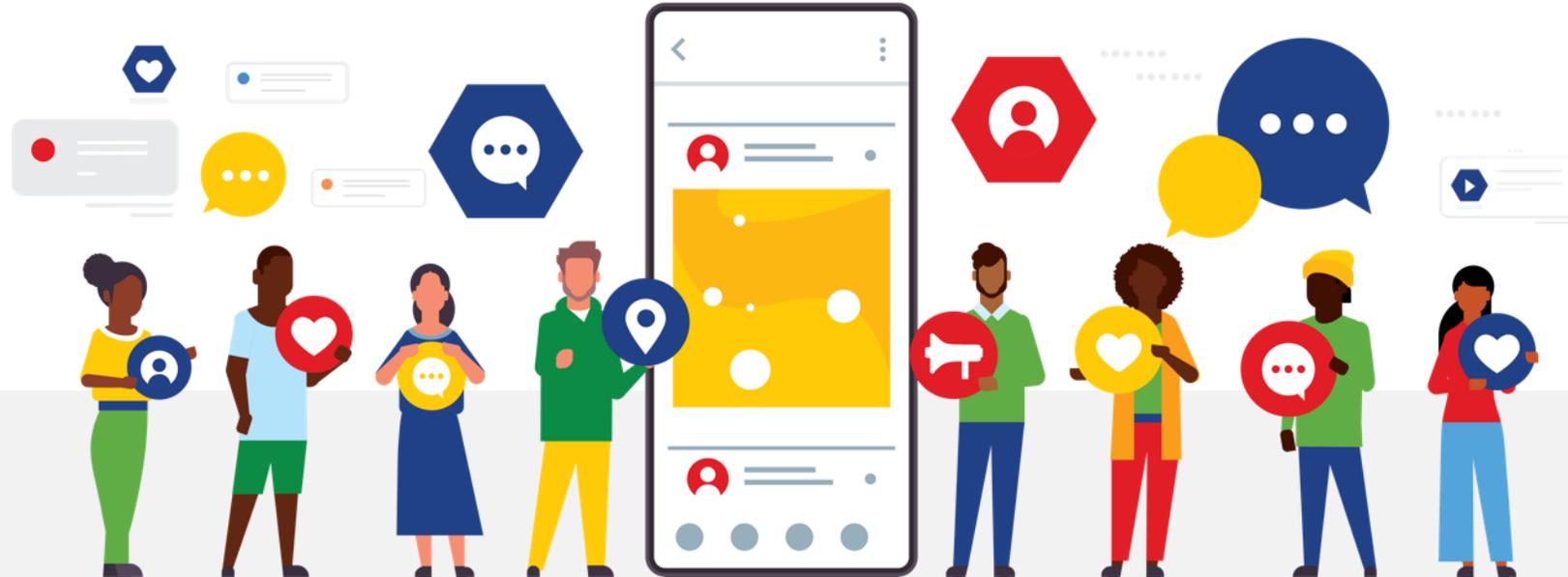
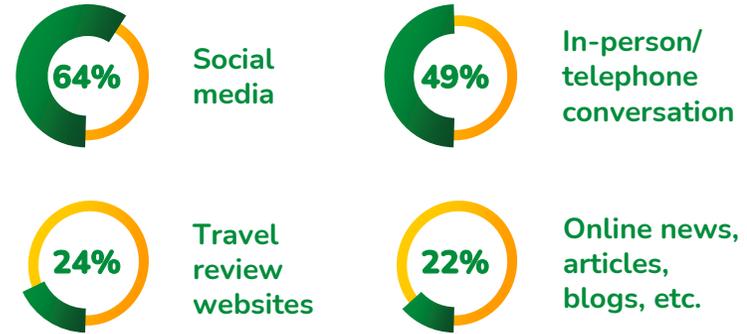
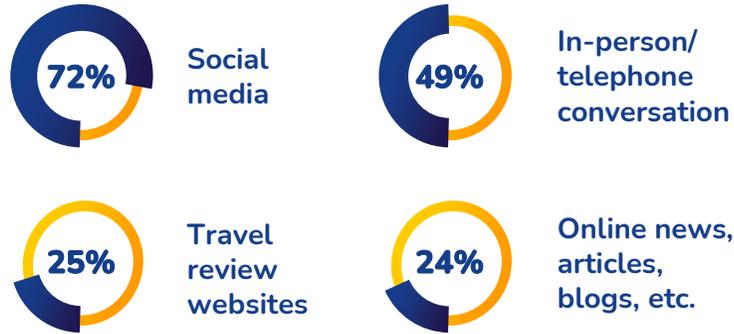


When sharing their holiday experiences, South Africans' preferred channels are social media, or person-to-person or telephone conversations

Preferred channels for sharing

Channels used to share details of holiday experiences during trips

Channels used to share holiday experiences after trips



## Why go?

### Top two reasons to travel

2019

Visiting friends  
and relatives  
53%



2022

Visiting friends  
and relatives  
44%

Holiday  
25%



Holiday  
27%

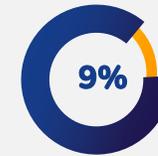
Most South African domestic travellers travel to **visit friends and relatives**. However, the proportion of travellers taking trips for other reasons has increased over the past few years, with the proportion of travellers visiting friends and family decreasing.



Source: SAT Domestic Survey 2022 (January – December)

## Who's going?

2019



Coloured

2022



Indian



White



Black



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



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



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



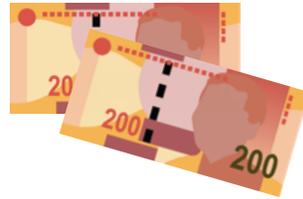
3. I travel within South Africa as the money I spend on trips **benefits my country/community**



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



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



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



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



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



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



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



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

**94%**

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

**87%**

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



Source: SAT Domestic Lifestyle and Brand Tracking Survey

## Ready to go

### Preferred Reasons to travel

42%



Explore beautiful scenery

31%



Relax at the beach

28%



Visit friends and relatives

25%



Engage in a variety of activities

20%



Go on safari

19%



Experience different cultures

15%



Fulfil a dream

15%



Friends/family recommended it

14%



Enjoy the warm climate

13%



Visit historic sites

### Preferred Reasons not to travel

43%



Other higher-priority expenses

41%



Insufficient time

20%



Hard to find affordable accommodation

15%



Health issues

10%



Hard to find information

10%



Concerns for my personal safety

10%



Bad climate

8%



Not comfortable with the type of people I might meet

8%



Afraid of civil unrest

7%



Find it hard to book transport



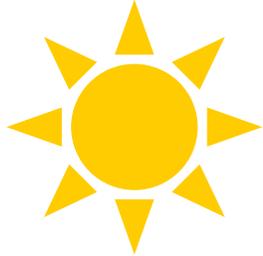
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KEY TRENDS



SOUTH AFRICAN TOURISM

## When to go?



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



## Domestic Key Trends

1

### Drivable Destinations

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

2

### Marketing and Sustainability

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

3

### Reviews

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

## Domestic Key Trends

### 4 Always On Digital

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

5

### Loyalty Programmes

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

6

### Self Care

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

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# Collaborating with Industry

Free promotion of your travel deals

Support - dedicated email [Shotleft@southafrica.net](mailto:Shotleft@southafrica.net)

Collaborate with industry SATSA, Provinces, Private Sector

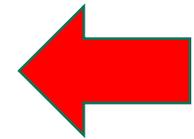
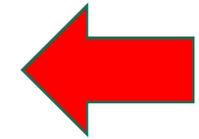
Information sharing and campaign updates - workshops and webinars maximising your partnership with Sho't Left

Extensive marketing - TV, Radio, Online, Social Media, Activations





Consumer



Travel Trade



# Domestic Campaigns

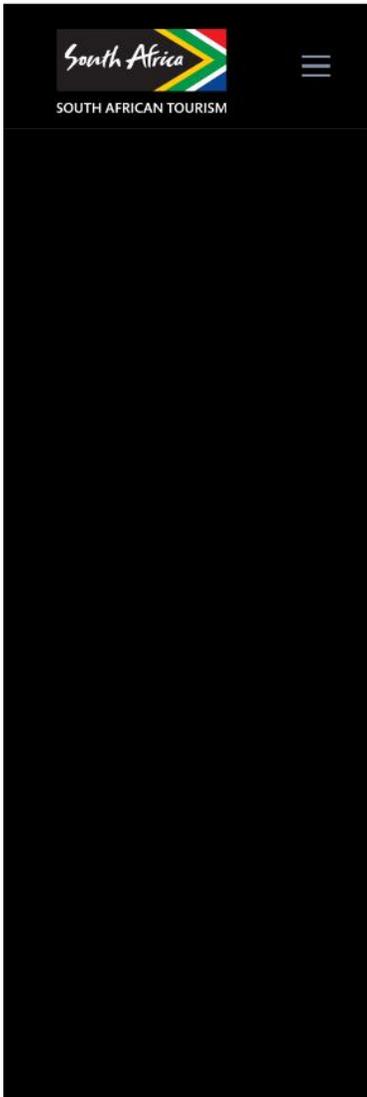


MONTH OF LOVE AND WINTER AS PART OF THE ALWAYS ON CONTENT

ALWAYS ON RECRUITMENT OF TRADE TO SUPPORT CAMPAIGN

ALWAYS ON WAZE CAMPAIGN

# New Trade Platform – www.profile.shotleft.co.za



## South African Tourism Partner Platform

Welcome to the South African Tourism Partner Platform, where we will give you exposure to Mzansi and our inbound travellers, allowing your business to be seen and heard like never before. Our marketing campaigns and industry collaborations are designed to drive consumers straight to your travel packages and deals, giving you the opportunity to reach an extensive market of potential customers.

Partner with South African Tourism by creating your profile and regularly creating deals and showcase our beautiful country to an extensive travel market.

All travel and tourism companies are invited to partner with us. Whether you are a small, medium, or large company operating accommodation, experiences, attractions, or you are a tour operator, travel agent, car hire, airline, restaurant, we are waiting to welcome you.

[Login →\]](#)

[Register →\]](#)

[Terms and Conditions](#)

[Admin Portal](#) ⚙️

# Sho't Left Travel Week Trade Campaign



**THE GREAT SOUTH AFRICAN SALE IS COMING**

4-10 SEPTEMBER  
IT'S YOUR COUNTRY ENJOY IT



**CREATE YOUR DEALS NOW!**

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#TravelWiseMzansi



SOUTH AFRICAN TOURISM



**COMING SOON 4-10 SEPTEMBER**

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**THE GREAT SOUTH AFRICAN SALE IS COMING**

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**REGISTER YOUR BUSINESS NOW**

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T&C's apply.



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4 Sept 2023 - 10 Sept 2023

Travel Week campaign is running from the 4th of September 2023 to the 10th of September 2023.

## DEALS - BOOK NOW EVENT RESULTS

Full page URL	Event name	Event count
1. <a href="https://shotleft.co.za/deals/sun-city-cabanas">shotleft.co.za/deals/sun-city-cabanas</a>	book_now	764
2. <a href="https://shotleft.co.za/deals/cabanas-hotel-sun-city-2-nights">shotleft.co.za/deals/cabanas-hotel-sun-city-2-nights</a>	book_now	223
3. <a href="https://shotleft.co.za/deals/the-palace---sun-city">shotleft.co.za/deals/the-palace---sun-city</a>	book_now	160
4. <a href="https://shotleft.co.za/deals/mpumalanga-bush-escape">shotleft.co.za/deals/mpumalanga-bush-escape</a>	book_now	156
5. <a href="https://shotleft.co.za/deals/the-kingdom-resort">shotleft.co.za/deals/the-kingdom-resort</a>	book_now	152
6. <a href="https://shotleft.co.za/deals/3*-cabanas---sun-city-family-package-2-nights">shotleft.co.za/deals/3*-cabanas---sun-city-family-package-2-nights</a>	book_now	145
7. <a href="https://shotleft.co.za/deals/5*-cascades---sun-city-family-package-2-nights">shotleft.co.za/deals/5*-cascades---sun-city-family-package-2-nights</a>	book_now	142
8. <a href="https://shotleft.co.za/deals/2023-year-end-girls-trip--durban-3-nights">shotleft.co.za/deals/2023-year-end-girls-trip--durban-3-nights</a>	book_now	112
9. <a href="https://shotleft.co.za/deals/mangrove-beach-estate">shotleft.co.za/deals/mangrove-beach-estate</a>	book_now	111
10. <a href="https://shotleft.co.za/deals/sun-city-activities-and-pilanesberg-budget-weekend">shotleft.co.za/deals/sun-city-activities-and-pilanesberg-budget-weekend</a>	book_now	110

Grand total 10,481

1 - 100 / 1978 < >

Deals-  
920

Leads-  
10 481

Deal Views  
- 123 492

Conversion  
Rate- 9%  
(Global  
standard is  
5%)



# Sho't Left Travel Week Provincial Participants

Province	2018	2019	2021	2022	Current 2023
Eastern Cape	33	63	52	43	32
Free State	10	30	9	20	19
Gauteng	82	127	67	103	187
KwaZulu-Natal	32	96	96	184	154
Limpopo	34	41	53	76	37
Mpumalanga	17	46	70	92	123
North West	17	45	26	78	62
Northern Cape	6	16	43	16	12
Western Cape	94	201	200	214	294
<b>TOTAL</b>	<b>325</b>	<b>665</b>	<b>616</b>	<b>826</b>	<b>920</b>

Get In Touch



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**#TRAVELWISEMZANSI**



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THANK YOU.



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