

DOMESTIC TRAVEL INTENT

SOUTH AFRICAN DOMESTIC CONSUMER
RESEARCH
DECEMBER 2021

Cape
Town
TOURISM

BACKGROUND AND DEMOGRAPHICS



To understand the projective behaviour of South Africans over the December holiday period, Cape Town Tourism conducted an online survey.

The survey explored both the intentions and motivations of South Africans who intend to travel in December as well as the challenges and influences of those who indicated that they did not expect to travel over the period.

Comparisons were made between the results of the current data vs. the results gathered in various other travel intent surveys over the past 12 months.

OBJECTIVE: Provide projective insight into the travel behaviour of South Africans over December 2021

METHODOLOGY: Quantitative online survey

FIELDWORK: 14 – 21 October 2021

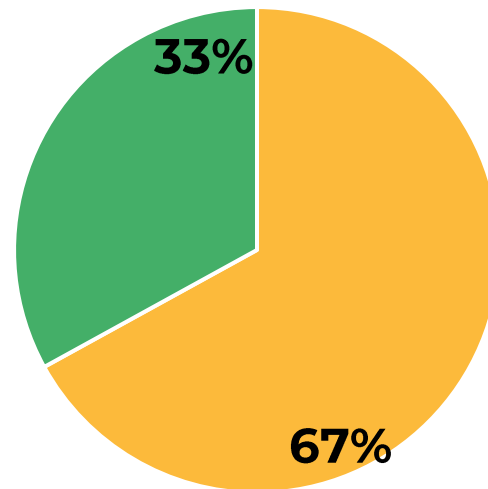
SAMPLE: 1728 responses: 1152 travellers and 576 non-travellers

DISTRIBUTION: Distributed by IndigoMO through digital channels



67% OF THE SAMPLE INDICATED THAT THEY INTENDED ON GOING AWAY OVER DECEMBER

Are you going away at all over the 2021 December Holiday period? Will you be leaving your home to stay elsewhere for one night or more?



■ Yes ■ No

This is a significant change when compared to the previous festive season study whereby 60% of participants indicated that they intended to stay at home over December 2020.

Influencers could include the reduced number of Covid-19 cases as well as the vaccine rollout.

DEMOGRAPHICS

AGE

23%	18-24 years old
36%	25-34 years old
25%	35-44 years old
9%	45-54 years old
5%	55-64 years old
3%	65+ years old

RACE

17%	White
62%	Black
14%	Coloured
6%	Indian/Asian/Other
1%	Prefer not to answer

ALL PARTICIPANTS RESIDE IN SOUTH AFRICA

The sample consisted of 1728 respondents in total. The bulk of the sample were 25-44 years old. Black participants made up the largest sample at 62%

Of the respondents that indicated that they would be travelling, 68% were black, 16% white and 14% coloured. There was a notable number of 45+ year old who were less likely to travel which could be due to higher Covid-19 risk.

GEOGRAPHIC DISTRIBUTION

20%	Western Cape	16%	Kwazulu-Natal
5%	Eastern Cape	44%	Gauteng
1%	Northern Cape	5%	Limpopo
3%	North West	3%	Mpumalanga
3%	Free State		



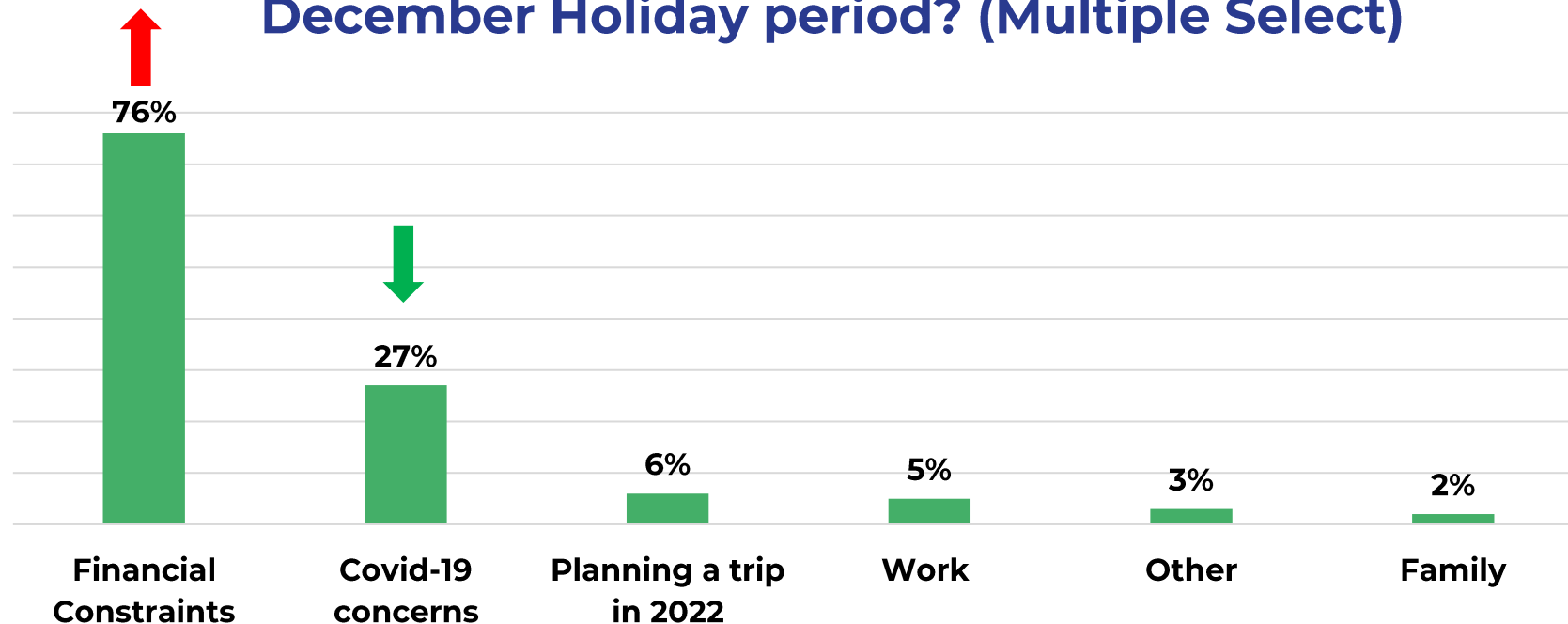
Note: In order to qualify to participate in the survey participants had to reside in a province within South Africa. The sample is statistically representative of South Africans residing in Gauteng, KwaZulu-Natal and the Western Cape.



NON-TRAVELLER FEEDBACK

FINANCIAL CONSTRAINTS 76% ARE AT AN ALL TIME HIGH

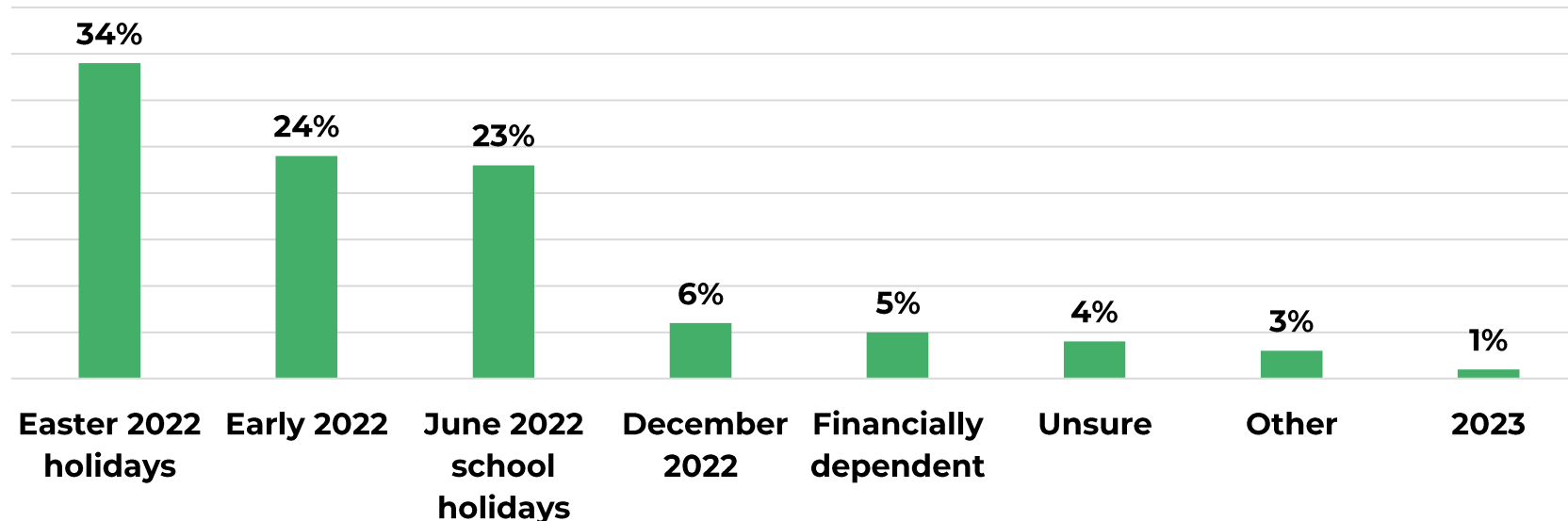
Please will you share with us why you are not going away over the December Holiday period? (Multiple Select)



In December 2020, 56% indicated financial challenges. There has been a downward trend in terms of Covid-19 concerns from 68% in December 2020 to 27% in 2021.

34% ARE HOPEFUL TO BE ABLE TO TRAVEL OVER THE 2022 EASTER HOLIDAY

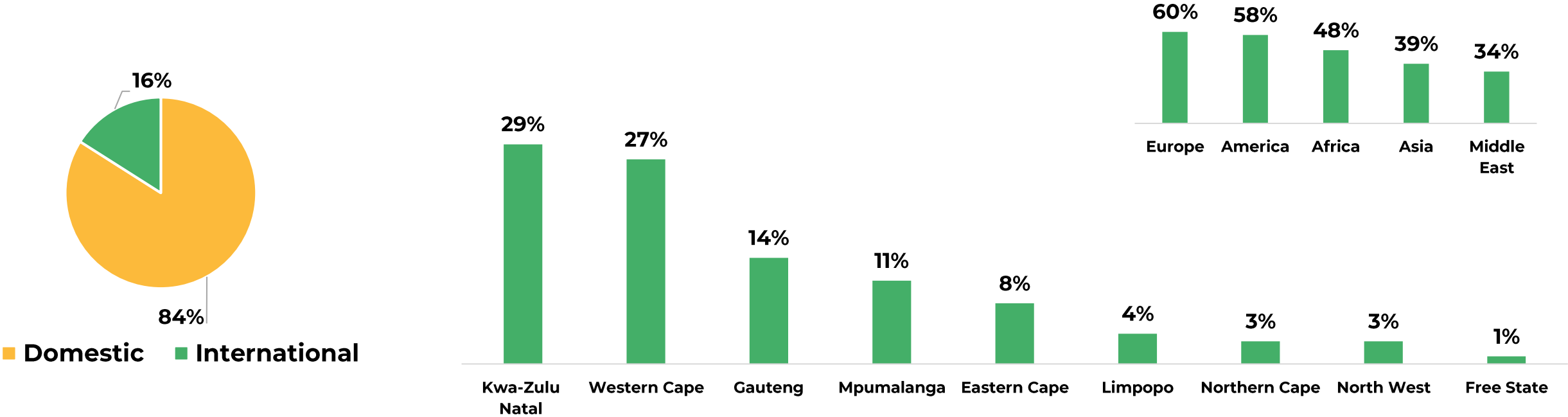
When would you consider going away?



However, considering the cited financial challenges and that only 6% indicated they had future travel plans, they are unlikely to travel in the near future.

KWAZULU-NATAL 29% AND WESTERN CAPE 27% WERE THE MOST POPULAR INTENDED DOMESTIC DESTINATIONS

When you are ready to travel again, where would you be most like to travel?



Considering that 76% of non-travellers indicated financial constraints as a barrier to travel, it is optimistic that 16% implied that they would most likely travel internationally when able to.

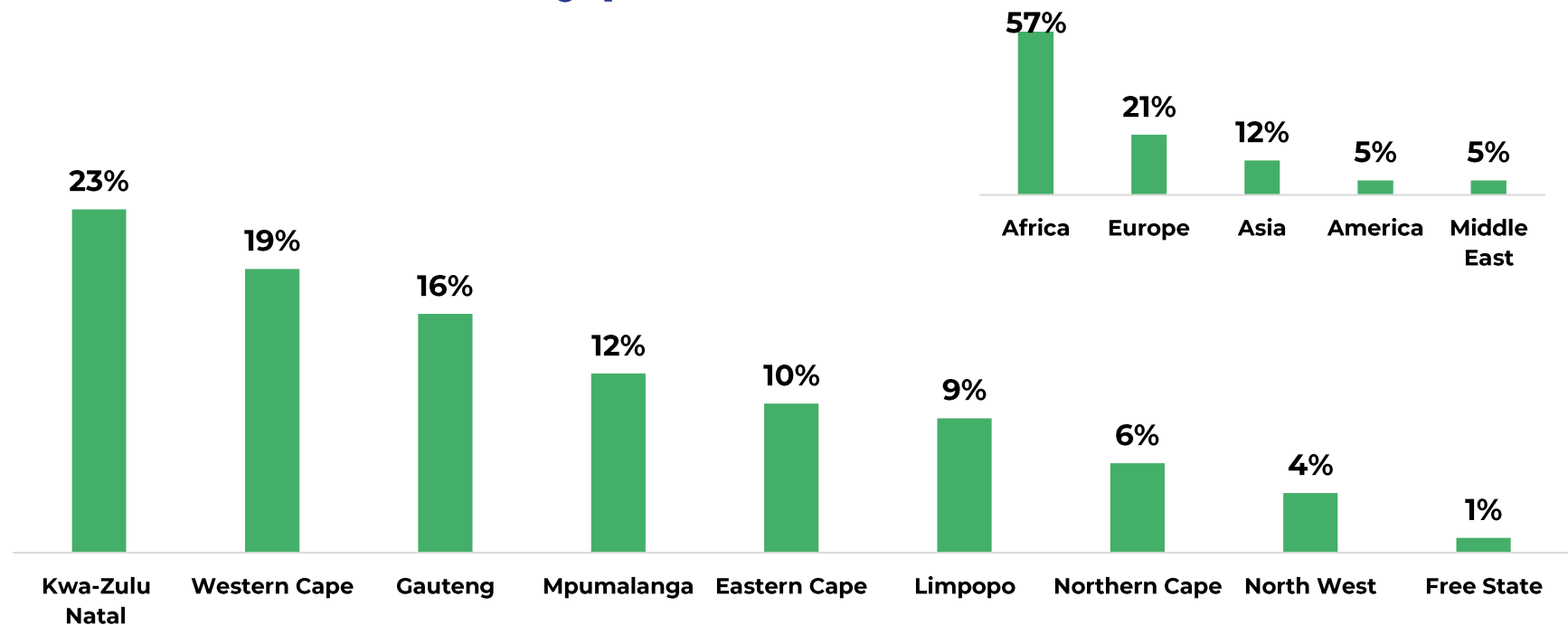
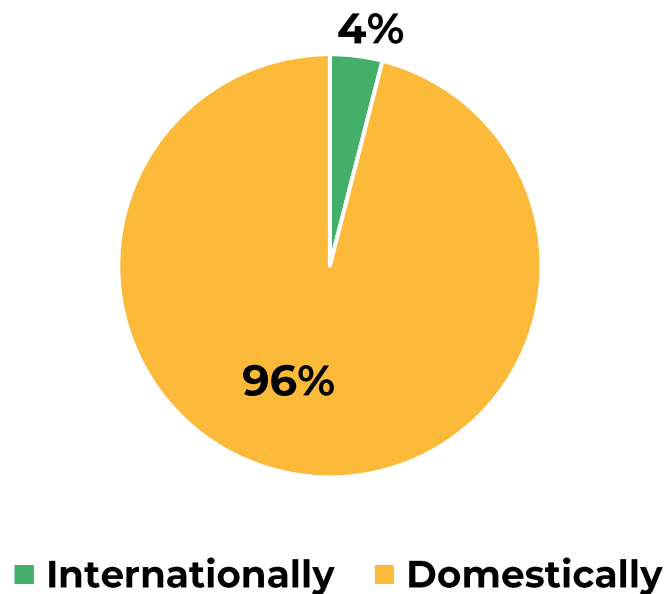


TRAVELLER INSIGHTS



AS SEEN IN THE PAST SURVEYS, THE TWO MOST POPULAR DOMESTIC HOLIDAY DESTINATIONS TEND TO BE KWAZULU-NATAL 24% AND THE WESTERN CAPE 19%

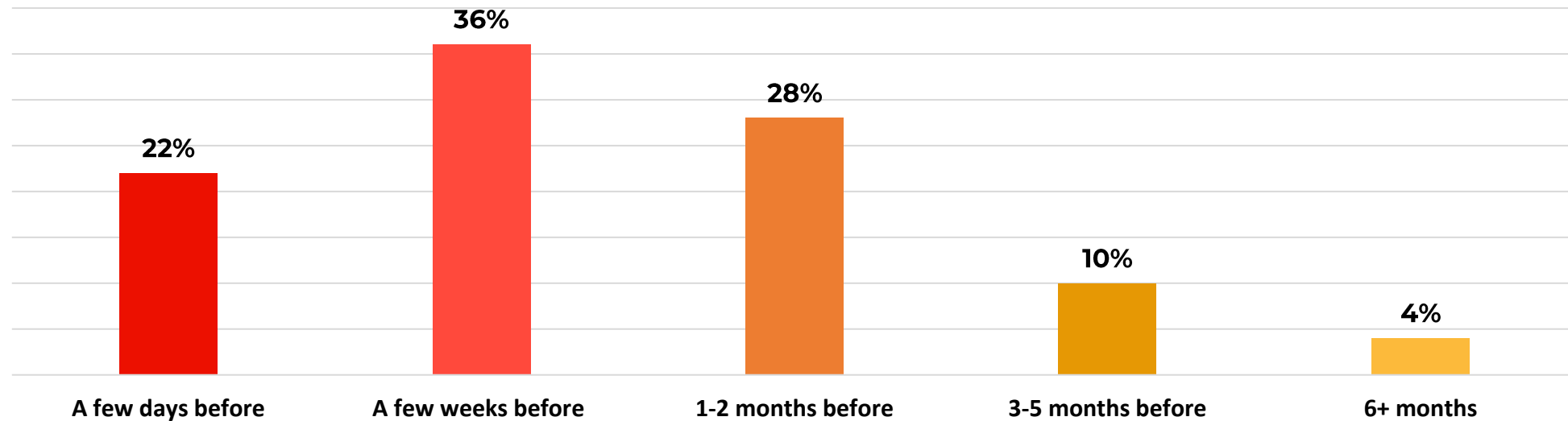
Will you be travelling domestically or internationally during the 2021 December Holiday period?



Of the 4% travelling internationally, Africa is the main destination considered.

24% INDICATED THAT THEY WOULD BOOK THEIR DECEMBER TRAVELS A FEW WEEKS OR EVEN DAYS BEFORE THEIR INTENDED TRAVEL

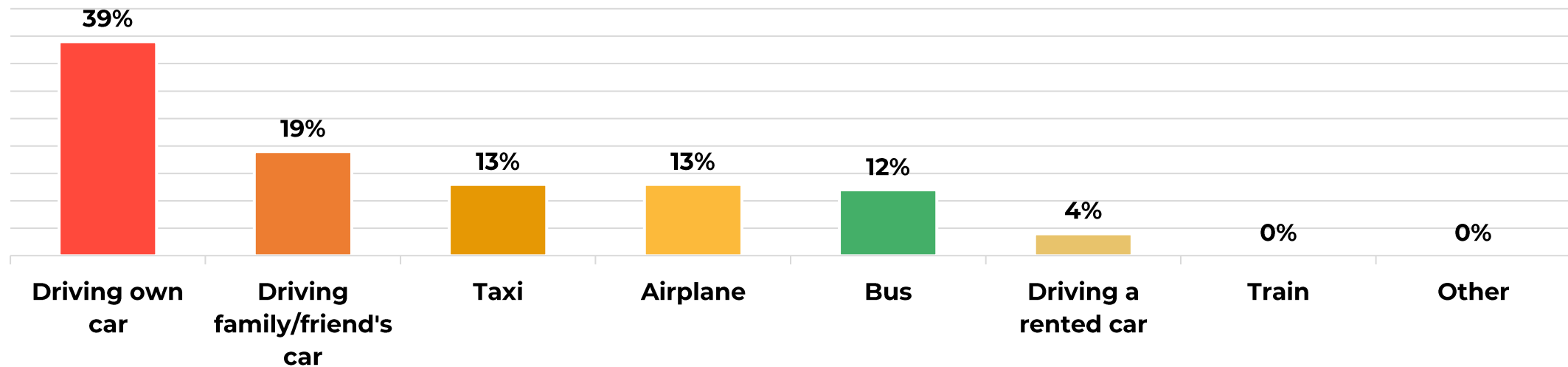
How far in advance did you book/are you intending on booking your trip?



This suggests that there could be a booking surge closer to the December holiday. There was some concern around availability but the reasons for the delay were implied to be as a result of cash flow (still saving up), fear of cancellations due to possible changes in restrictions and loss of money.

PRIVATE TRANSPORT 39% IS STILL THE MOST COMMON INDICATED MODE OF TRANSPORT

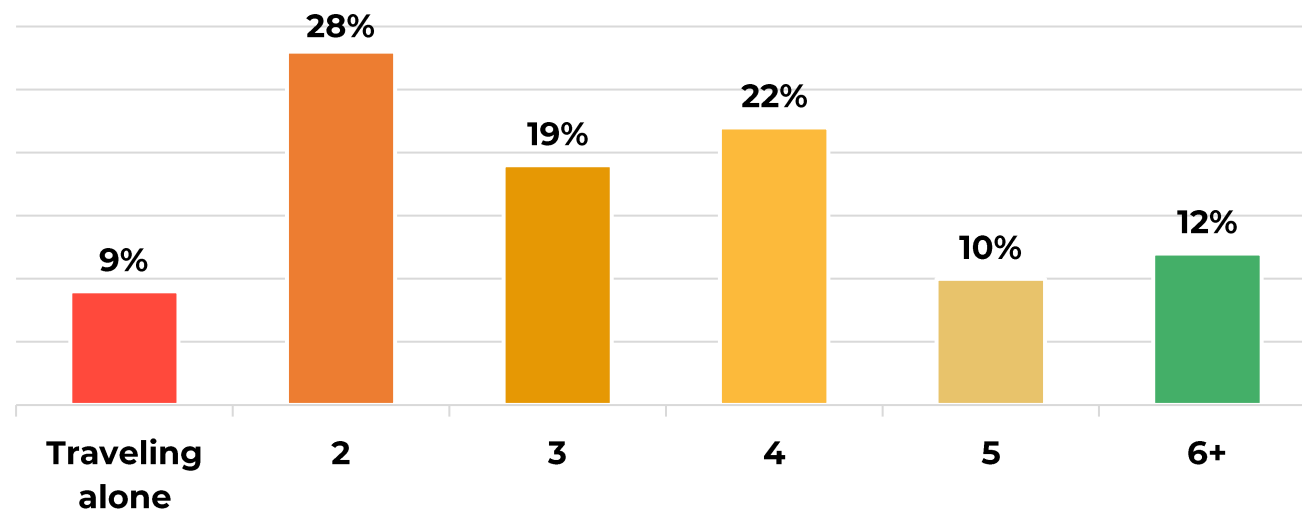
How are you planning on travelling to your destination? What is the main form of transport that you will be using to reach your destination?



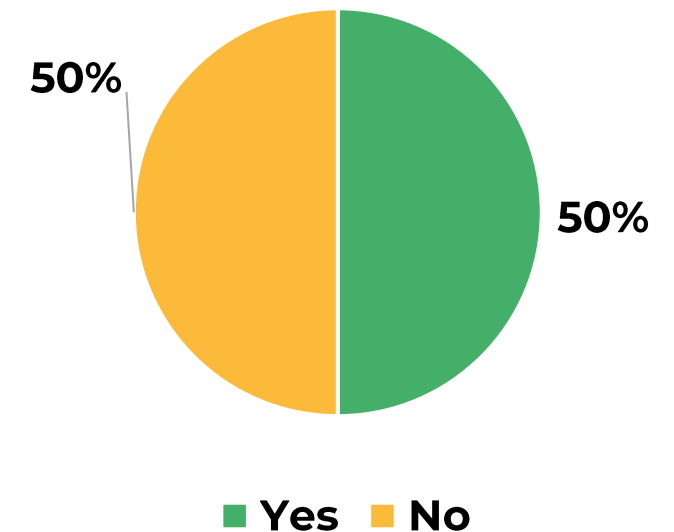
However, there is an increase in other modes of transport indicated that there is a shift towards travellers being more open to collective modes of transport.

THE MOST COMMON PARTY SIZE WERE GROUPS OF TWO 28%

Including yourself, how many people are in your travel party?



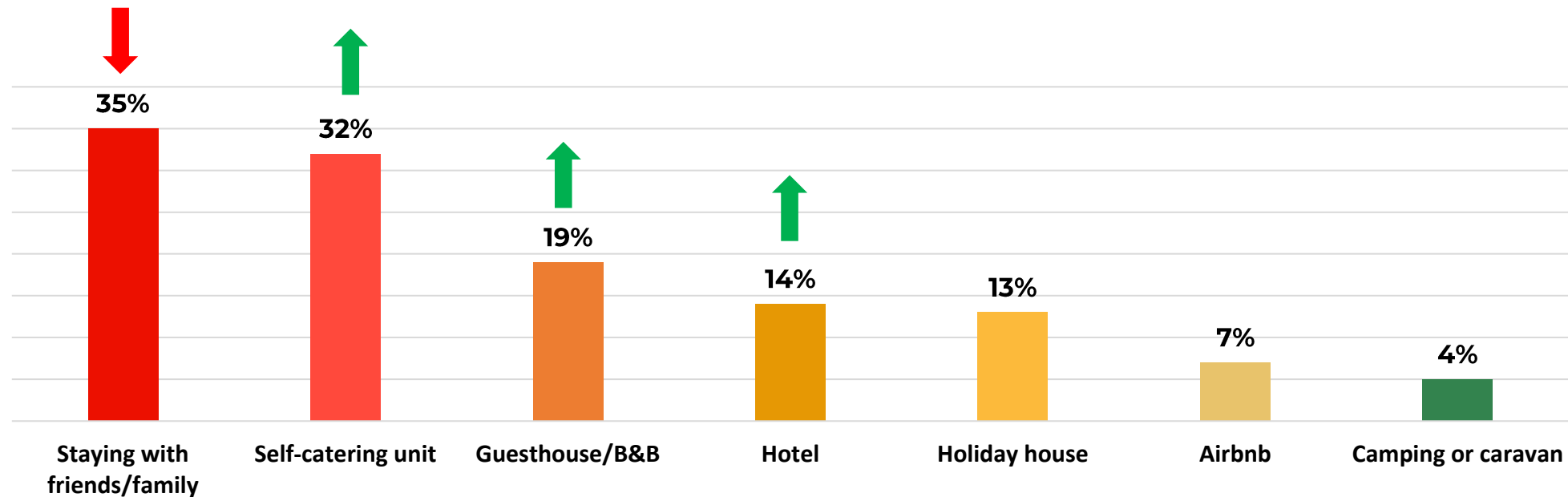
Are you travelling with children?



Parties of 3 or more are likely families travelling with children – reinforced by the response that 50% of travellers will be travelling with children.

DESPITE DECEMBER TYPICALLY BEING ASSOCIATED WITH FAMILY THERE HAS BEEN A NOTEWORTHY DECREASE IN THE SAMPLE INDICATED THAT THEY INTENDED STAYING WITH FRIENDS/FAMILY 35%

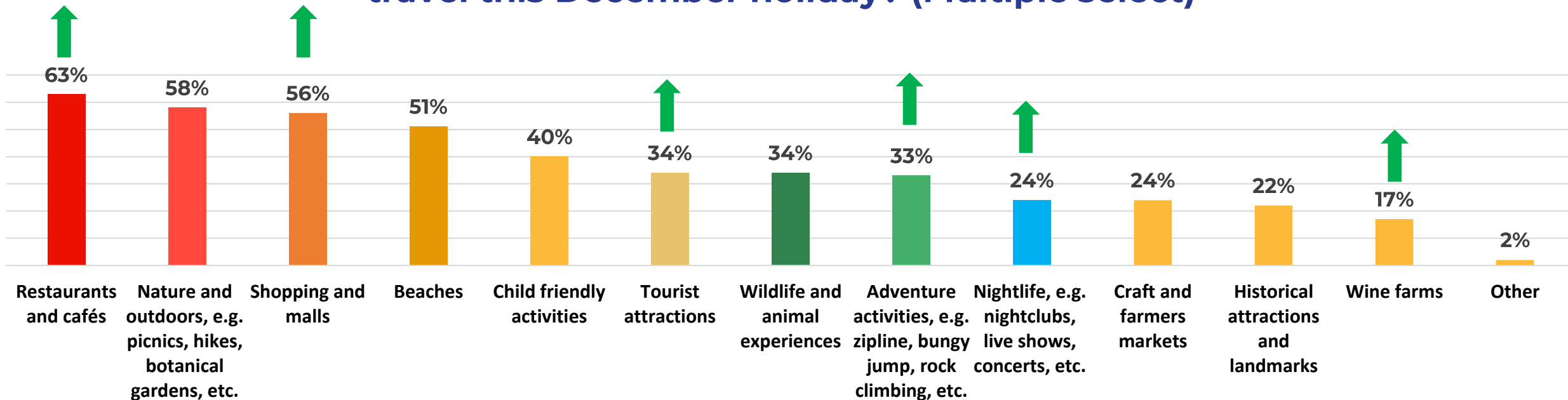
What type/s of accommodation are you planning on staying at? (Multiple select)



There has been an increase in paid-for accommodation options when compared to previous surveys. This indicates a shift towards feeling more comfortable and pre-pandemic behaviour.

FOR THE FIRST TIME IN THE PAST YEAR, THE INTENTION TO VISIT RESTAURANTS AND CAFÉS WAS THE MOST FREQUENTLY SELECTED ACTIVITY 63%

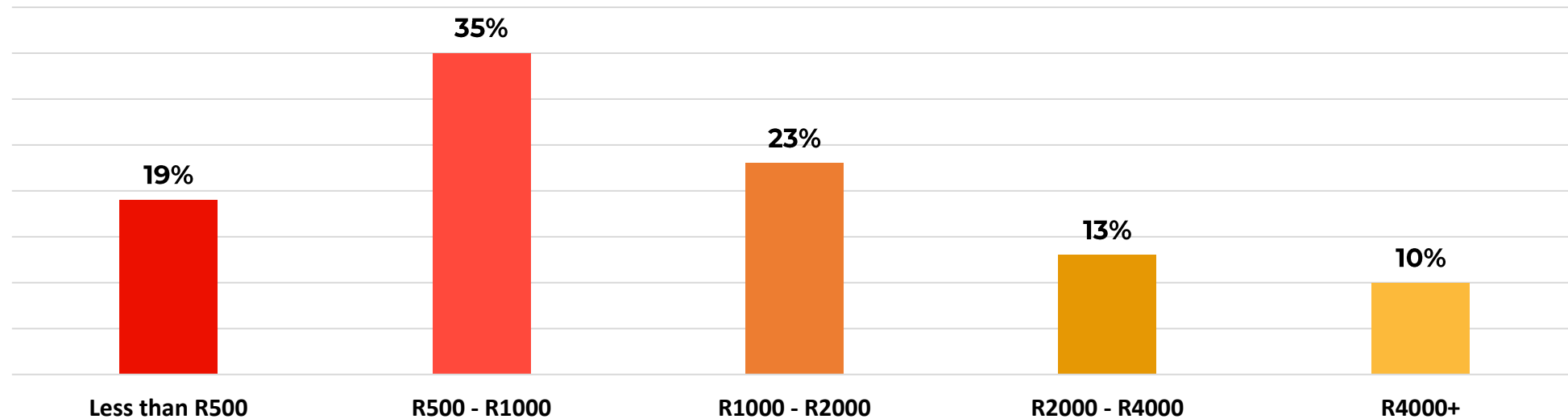
Which of the following activities are you planning to include while you travel this December holiday? (Multiple select)



This shows a significant shift in consumer mindset toward being in public and partaking in what has been considered a higher risk activity. Similarly, the most significant return has been “shopping and malls” (56% in December 2021 vs. 29% in December 2020). There are also other positive intentions to include more entertainment, social and experiential activities.

**MOST INDICATED BUDGETS WERE BETWEEN R500
– R1000 35% AND R1000 – R2000 23%**

What is your budget per day (including accommodation)?

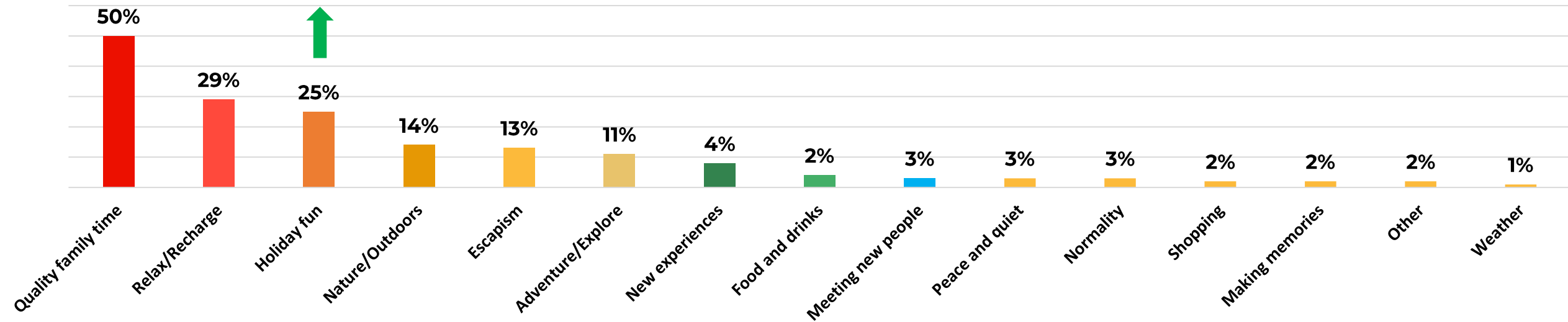


Larger groups were more likely to indicate larger daily budgets, with 31% of 5 person travel parties indicating a budget of R1000 – R2000 and 37% of parties of 6+ having a budget of R2000 and more.

Whilst participants are eager to incorporate more holiday activities in December 2021, budgets remain relatively constrained.

QUALITY TIME 50% WITH FAMILY IS STILL CONSISTENTLY THE MAJOR HOLIDAY HIGHLIGHT

What are you looking forward to most about your December holiday?
(Open-ended)

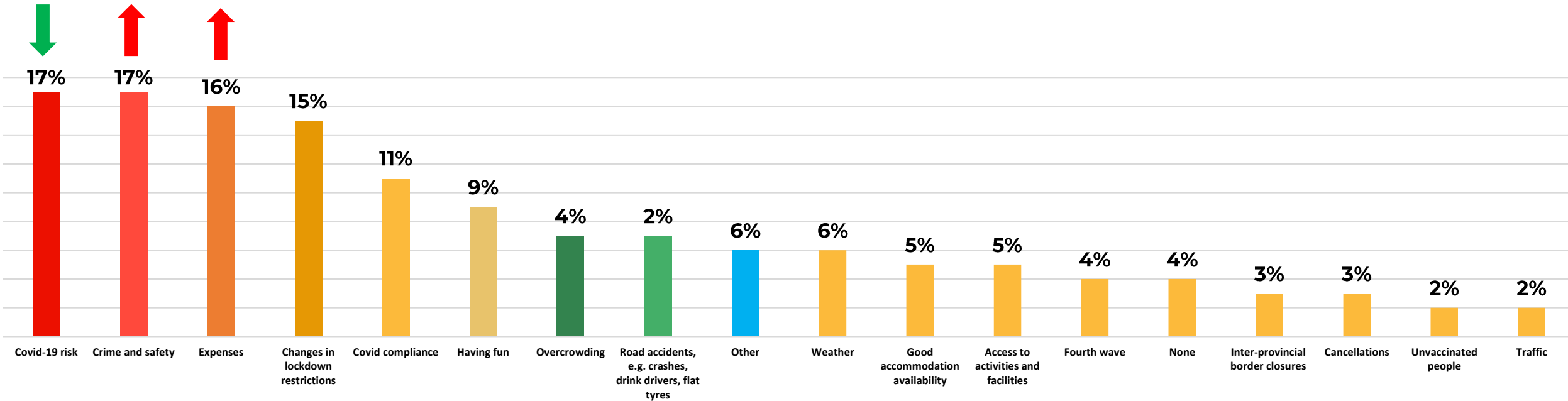


Consistent with December 2020, 29% were looking forward to unwinding and using December to recuperate after another difficult year.

However, positively, “fun” was a significant mention this year with 25% looking forward to having fun and celebrating.

AND WHILST CONCERNS AROUND COVID-19 HAVE SIGNIFICANTLY DECREASED COMPARED TO PREVIOUS SURVEYS, IT IS STILL REFERENCED BY 17%

What is your biggest concern regarding your December holiday? (Multiple select)



Two concerns that have increased are crime and safety (17%) and expenses (16%). Crime has shown a considerable increase from 8% in December 2020.

The instability of lockdown regulations and restrictions is likely the cause for the increase in the concern from 5% to 15%.

What your biggest concern about your holiday?

Me and my friend's haven't saved enough money for the trip and I am hoping that we stay on level 1 so that everything would be perfect for the trip.

The safety of the area we are going to and whether the accommodation has thoroughly disinfected the house before we come.

Traffic on the roads. Due to the high volumes around that period, the accident rates rise.

My biggest concern is that the destination that we booked is having discussions about closing some of the facilities.

My safety on the road is my main concern, and secondly, overcrowding at transport destinations with safety rules not being adhered to.

We have our own budget set up but with the price increase on petrol and other things, one can't be too sure if our budget is going to be enough.

Dealing with unmasked people and people who don't want to vaccinate. Human trafficking and kidnapping.

Being safe. Avoiding all the crime hotspots and being an easy target especially as a woman, hence I will be travelling with other people.

I pray that there will not be another outbreak around the holidays. I am very nervous and worried about that.

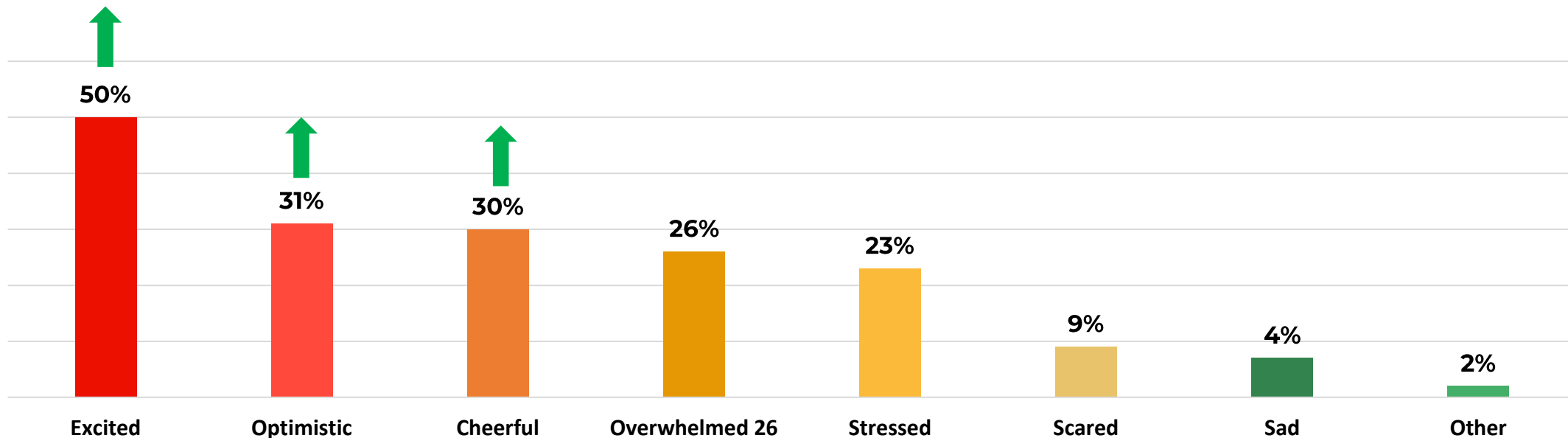
Safety of myself and the people I visit. Not only from the possible infection but also safety from criminals and similar dangers.

We are planning to travel at peak times. I hope the guest houses and B&Bs will be able to follow health protocols.

I would be concerned if the place we booked doesn't adhere to protocols because we are there to have fun and relax. We need to know if we are safe.

THERE HAS BEEN A POSITIVE SHIFT IN MINDSET SINCE 2020

Which of the following words could be used to describe how you are feeling as we approach the 2021 December holiday? (Multiple select)



50% have indicated that they were excited in the approach to the December holiday period.

Overall, it appears that travellers are more upbeat whilst non-travellers are far more inclined to be stressed (37%), scared (13%) and sad (14%) which could be linked to the financial constraints that are creating the barrier to travel.

What about this holiday are you looking forward to most? (Open-ended)

To create memories and celebrating milestones that I've accomplished for this far. Also to meet new people and create connections.

I'm looking forward to spending time with my whole family, shopping and the beach.

To relax and have fun. To explore and be with the people I care about.

Going out after 2 years due to the pandemic, this is something we are looking forward to.

I am looking forward to travelling and sightseeing my wish list places.

I am looking forward to having fun and enjoying each other's company because we need a breather and fresh air. This year has been rough.

Supporting small businesses. Learning more about others and having fun. I am most definitely looking forward to doing things I've never done before.

The freedom of movement. Fresh air, beaches, picnics, outdoor anything! Pictures, beautiful memories.

Looking forward to celebrating and enjoying the festive season with my family and friends and enjoy the moments in a safe way.

To get away with the kids and just spend time with them as this year has been busy with many unexpected things happening.

Fun, explore and relax. It's been a long time since we relaxed from work since we were under lockdown last December.

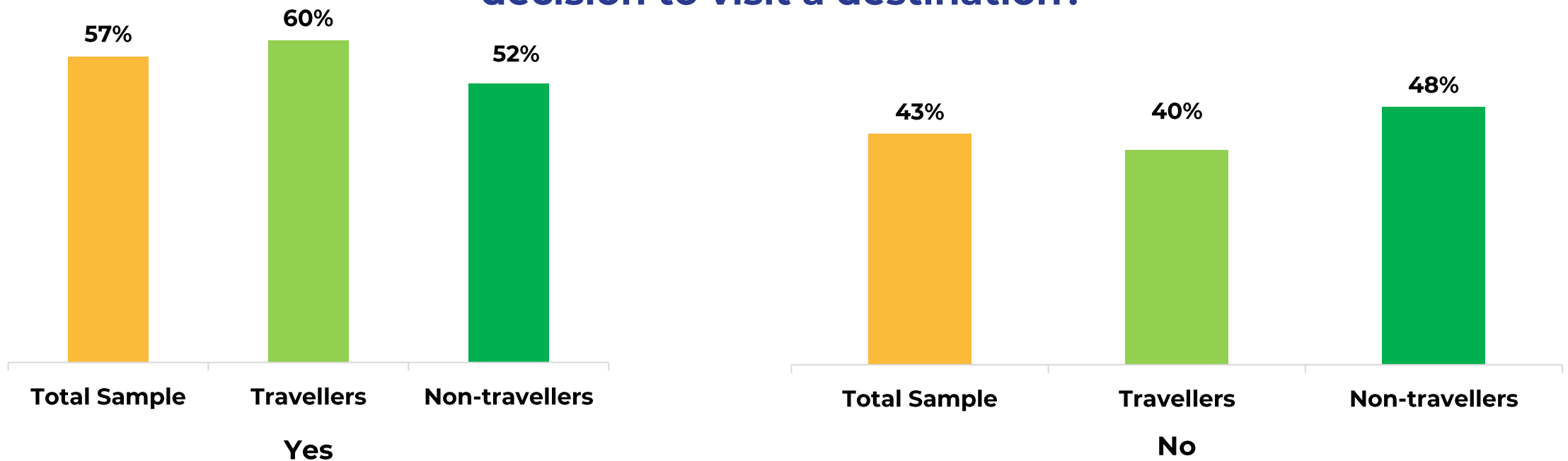
Having a well deserved break, spending quality time with my family and enjoying everything our destination has to offer.



INFLUENCE OF PANDEMIC MITIGATION FACTORS

57% OF THE TOTAL SAMPLE INDICATED THAT THE VACCINATION RATE AND/OR COVID-19 SAFETY PROTOCOLS INFLUENCE THEIR CHOICE OF TRAVEL DESTINATION

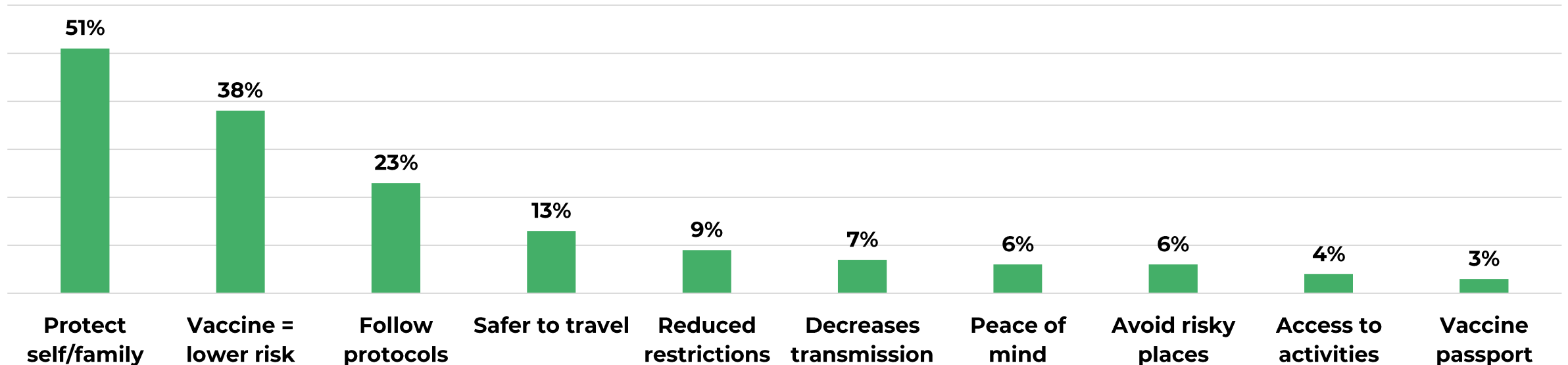
Does the vaccination rate/or Covid-19 safety protocols influence your decision to visit a destination?



Travellers were slightly more inclined to find these factors influential to their decision making.

AND THE PRIMARY REASON WAS TO KEEP ONESELF
AND THEIR FAMILY SAFE 51%

Why does the vaccination rate and/or Covid-19 safety protocols influence your decision to visit a destination?



Participants felt that many have become less diligent to following safety protocols and as such, 23% commented that they would prefer a destination where protocols are actively upheld for the safety of guests and patrons.

THANK YOU

