

A scenic beach at sunset with many birds flying in the sky and people walking on the shore. The sun is low on the horizon, creating a warm, golden glow. The sky is filled with numerous birds in flight. In the foreground, the wet sand reflects the light. Several people are visible on the beach, some walking and others standing near the water's edge. The overall atmosphere is peaceful and beautiful.

Highlights of domestic tourism's performance in 2014

Overview of 2014 (Domestic)

The total number of domestic trips increased by 11% in 2014 to reach 28 million trips compared to the 25,2 million trips taken in 2013. Approximately 12 million South African adults took a domestic trip in 2014, the same number of travelers we had in 2013. However, the average number of trips taken per traveler increased from 2.1 in 2013 to 2.3 in 2014.

VFR remains the main purpose of all domestic trips and accounted for 73% of all domestic trips taken in 2014. This has increased from the 70% of 2013.

Holiday trips accounted for 10% of all domestic trips taken in 2014, down from the 12% of 2013.

Business trips accounted for 6% of all domestic trips taken in 2014, down from the 8% of 2013.

The total revenue generated from domestic trips was R26,8 billion in 2014, an increase of 11% over the R24,3 billion of 2013. The increase in revenue was as a result of the increase in the number of domestic trips as the average spend per trip decreased from R980/trip in 2014 to R950/trip in 2013. This can be attributed to the increase in the number of VFR trips in 2014 which tend to have a lower average spend relative to other types of domestic trips.

The average length of a domestic trip decreased from 4.4 nights in 2013 to 4 nights in 2014. However, given that there were more trips taken in 2014 than in 2013, the total number of bednights increased by 2% from 111,3 million in 2013 to 113,1 million in 2014.

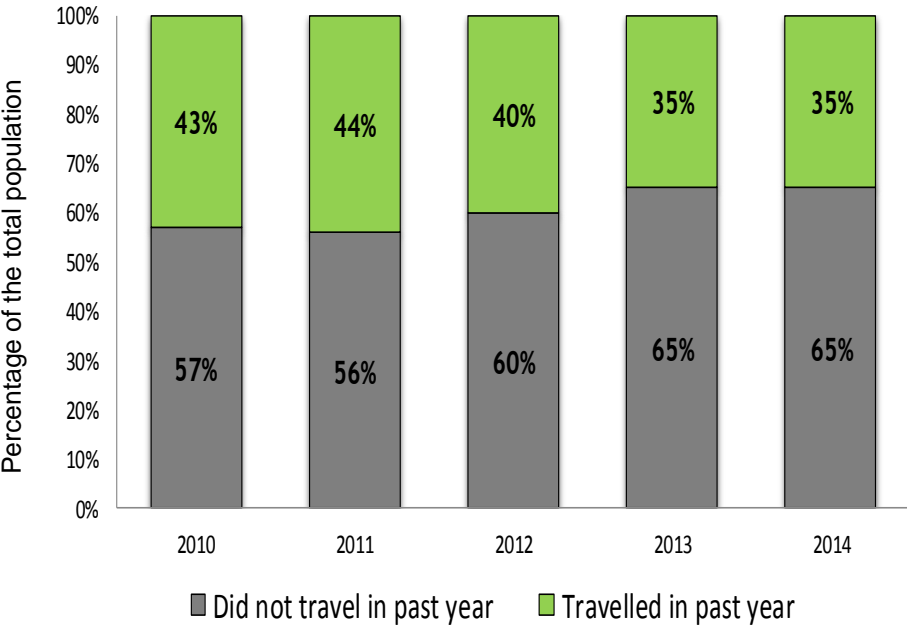
Economic constraints remain the biggest barrier to domestic travel with 48% of the adult population mentioning that they cannot afford to travel and they are unemployed/ have no income.

Headline indicators: Domestic Tourism

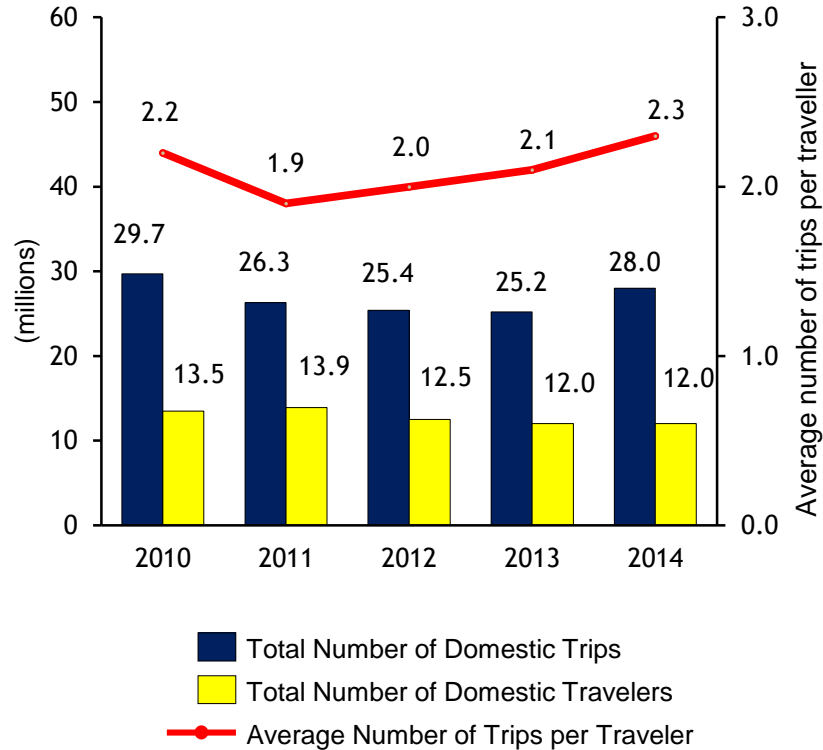
Key Metrics		2010	2011	2012	2013	2014
Domestic Travel Incidence	Annual	43%	44%	40%	35%	35%
	Monthly ¹	8%	7%	6%	6%	7%
Number of Trips	Annual	29.7 Million	26.3 Million	25.4 Million	25.2 Million	28.0 Million
	travellers	13.5 million	13.9 million	12.5 million	12.0 million	12.0 million
	Avg. Trip taken	2.4	2.1	2	2.1	2.3
	By Purpose	VFR: 74%, Holiday: 13%, Business: 5%,	VFR: 73%, Holiday: 15%, Business: 4%,	VFR: 72%, Holiday: 12%, Business: 7%,	VFR: 70%, Holiday: 12%, Business: 8%,	VFR: 73%, Holiday: 10%, Business: 6%,
Spend	Total Annual Spend	R21.1 Billion	R20.2 Billion	R21.8 Billion	R24.3 Billion	R26.8 Billion
	By Purpose	VFR: 51%, Holiday: 31%, Business: 14%	VFR: 53%, Holiday: 29%, Business: 12%	VFR: 52%, Holiday: 23%, Business: 17%	VFR: 47%, Holiday: 26%, Business: 19%	VFR: 51%, Holiday: 22%, Business: 20%
	Average Spend per Trip / per Day	R710 / Trip;	R760 / Trip;	R850 / Trip;	R980 / Trip;	R950 / Trip;
		R160 / Day	R170 / Day	R180 / Day	R210 / Day	R230 / Day
Trip Length	Total Annual Bed Nights	130.8 Million	114.8 Million	121.2 Million	111.3 Million	113.1 Million
	Average Nights per Trip	4.4	4.4	4.8	4.4	4.0

Approximately 12 million South African adults took a domestic trip in 2014, the same number of travelers we had in 2013. However, the average number of trips taken per traveler increased from 2.1 in 2013 to 2.3 in 2014 resulting in an 11% increase in the total domestic trips taken in 2014

Percentage of Adult Population That Has Taken A Domestic Trip Over Past Year: 2010-2014



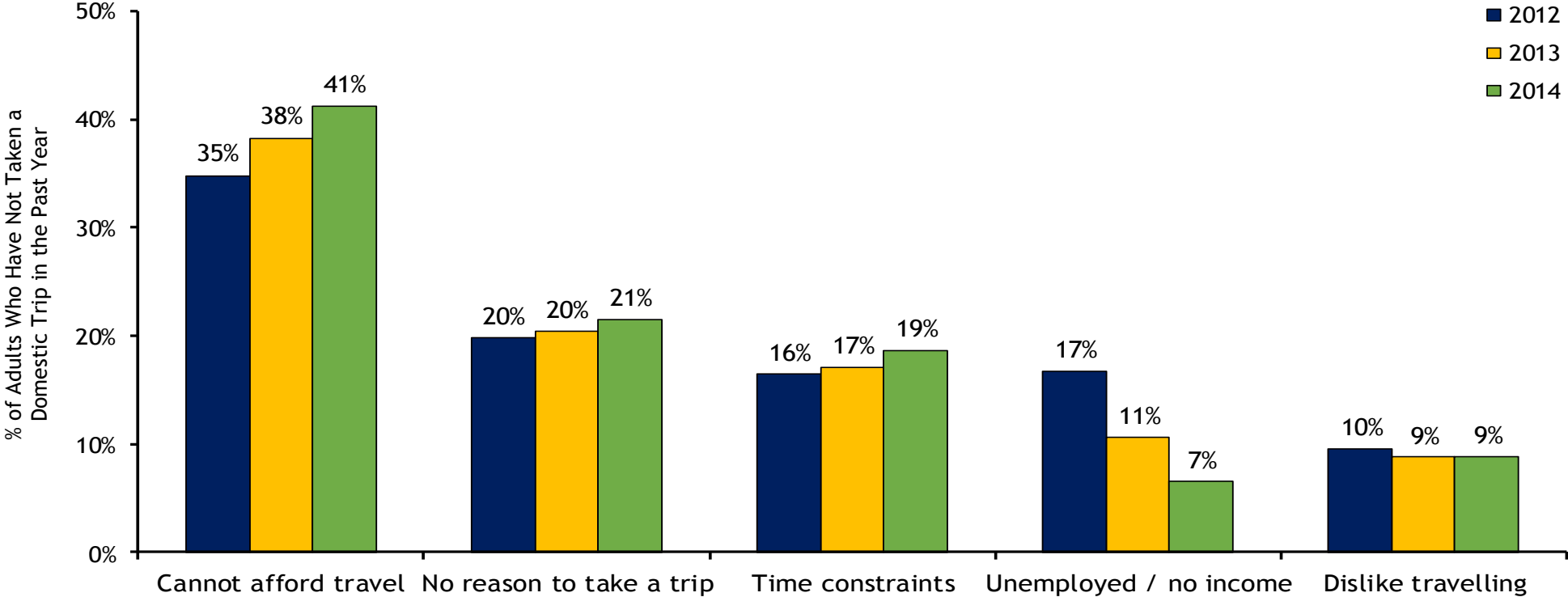
Number of Domestic Trips and travellers: 2010-2014



Note: Based on the question "How many domestic trips have you yourself taken in the past 12 months?" asked in each of the monthly surveys; therefore, incidence does not correspond to an exact Jan.-Dec. time frame, but rather is an average for any point in time over the course of the year
 Source: SAT Domestic Surveys for 2010-2014

Economic constraints remains the major barrier to domestic travel. More people indicate that they cannot afford to travel compared to the previous years. Fewer people indicated that unemployment was a barrier to domestic travel

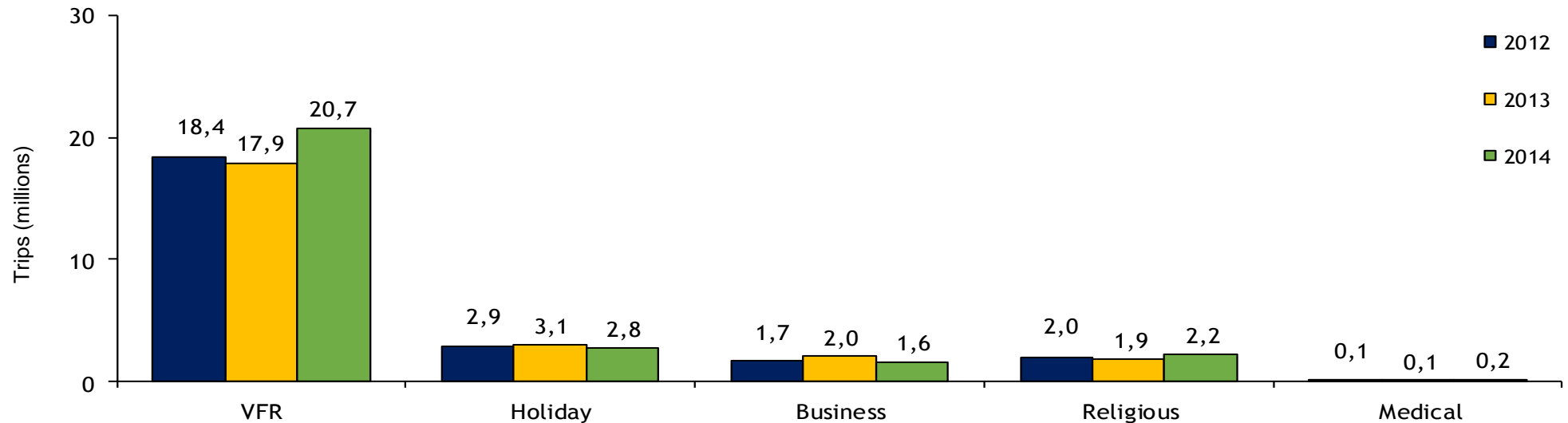
Top Five Reasons For Not Having Taken a Domestic Trip : 2012-2014¹



¹ Respondents could give more than one reason for not taking a trip
Source: SAT Domestic Surveys for 2012-2014

VFR remains the major reason for domestic trips and the number of domestic trips increased in 2014 compared to 2013. The number of holiday and business trips taken in 2014 decreased compared to 2013 and were even lower than 2012 levels

Number of Domestic Trips by Purpose (in millions): 2012-2014



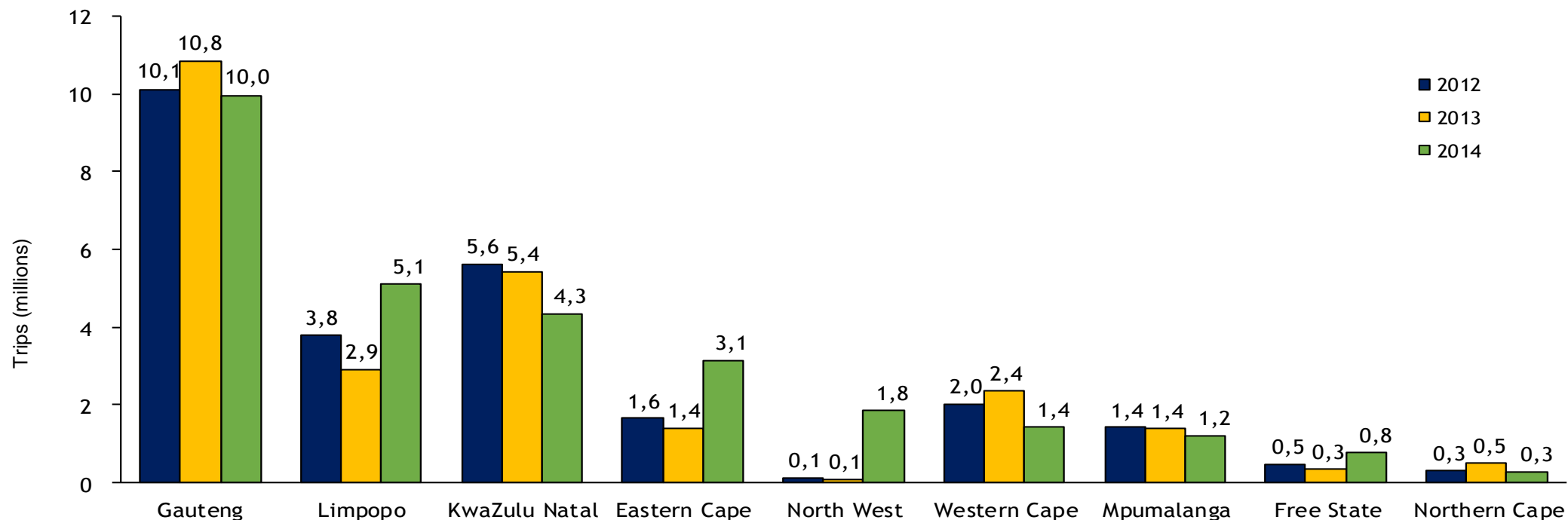
% growth '13 vs '12	-2,8%	5,4%	20,6%	-7,0%	18,4%
% growth '14 vs '13	15,7%	-9,1%	-19,7%	19,7%	86,4%
CAGR '12 to '14	6,0%	-2,1%	-1,6%	5,5%	48,6%

Note: Share of trips does not add to 100% because of category "Other" that is not shown on the graph; Holiday includes sports (spectator) and shopping (personal); Business includes business (professional), business (MICE), shopping (resale) and sports (participant)

Source: SAT Domestic Surveys for 2012-2014

Gauteng (36%), Limpopo (18%) and KwaZulu Natal (15%) were the top 3 source markets in 2014. Together these three provinces account for generated more than two thirds of all domestic trips (69%)

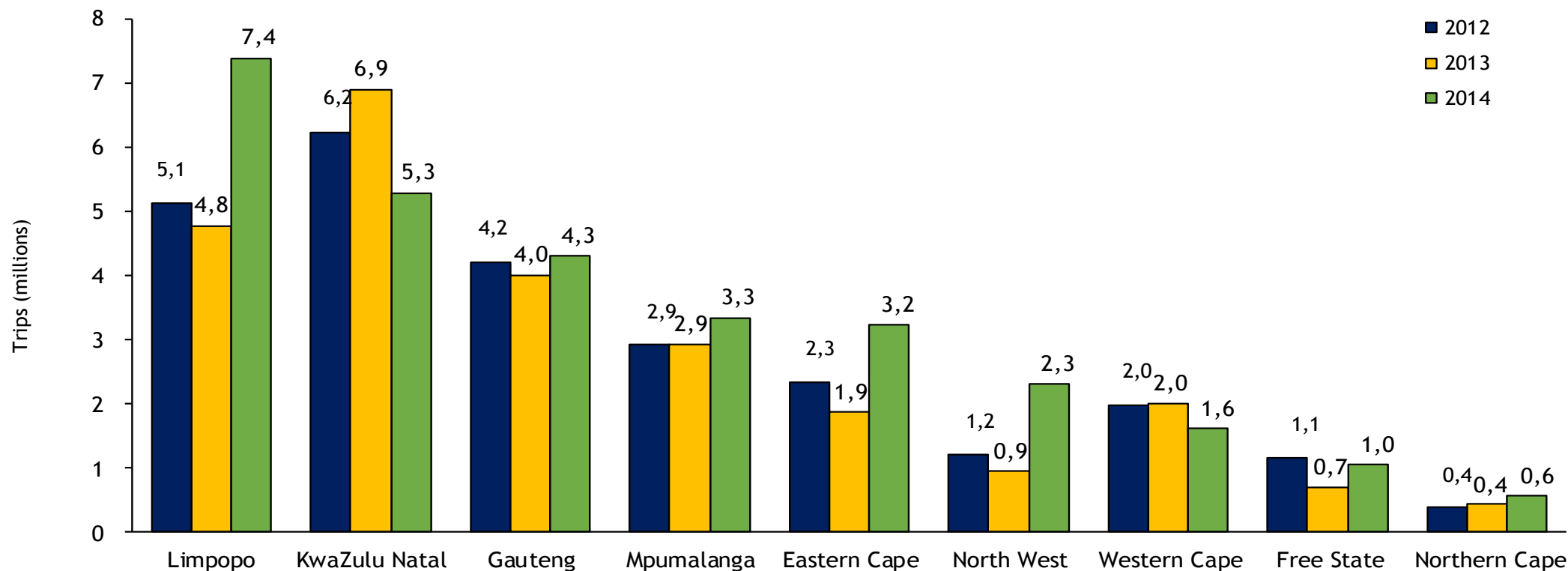
Annual Domestic Trips by Province of Residence (Source Markets): 2012-2014



% growth '13 vs '12	7,1%	-23,0%	-3,5%	-14,4%	-36,2%	17,0%	-1,9%	-30,1%	64,1%
% growth '14 vs '13	-8,0%	75,1%	-20,1%	123,4%	2253,5%	-39,5%	-12,6%	134,0%	-42,9%
CAGR '12 to '14	-0,7%	16,2%	-12,2%	38,3%	287,4%	-15,9%	-7,4%	27,9%	-3,2%

Trips to Limpopo increased from 4,8 million in 2013 to 7,4 million in 2014 thus shifting Limpopo up to the most visited province in 2014. KwaZulu Natal (5,3 million) and Gauteng (4,3 million) were the next two most visited provinces in 2014

Annual Trips to Each Province (Destination Markets*): 2012-2014



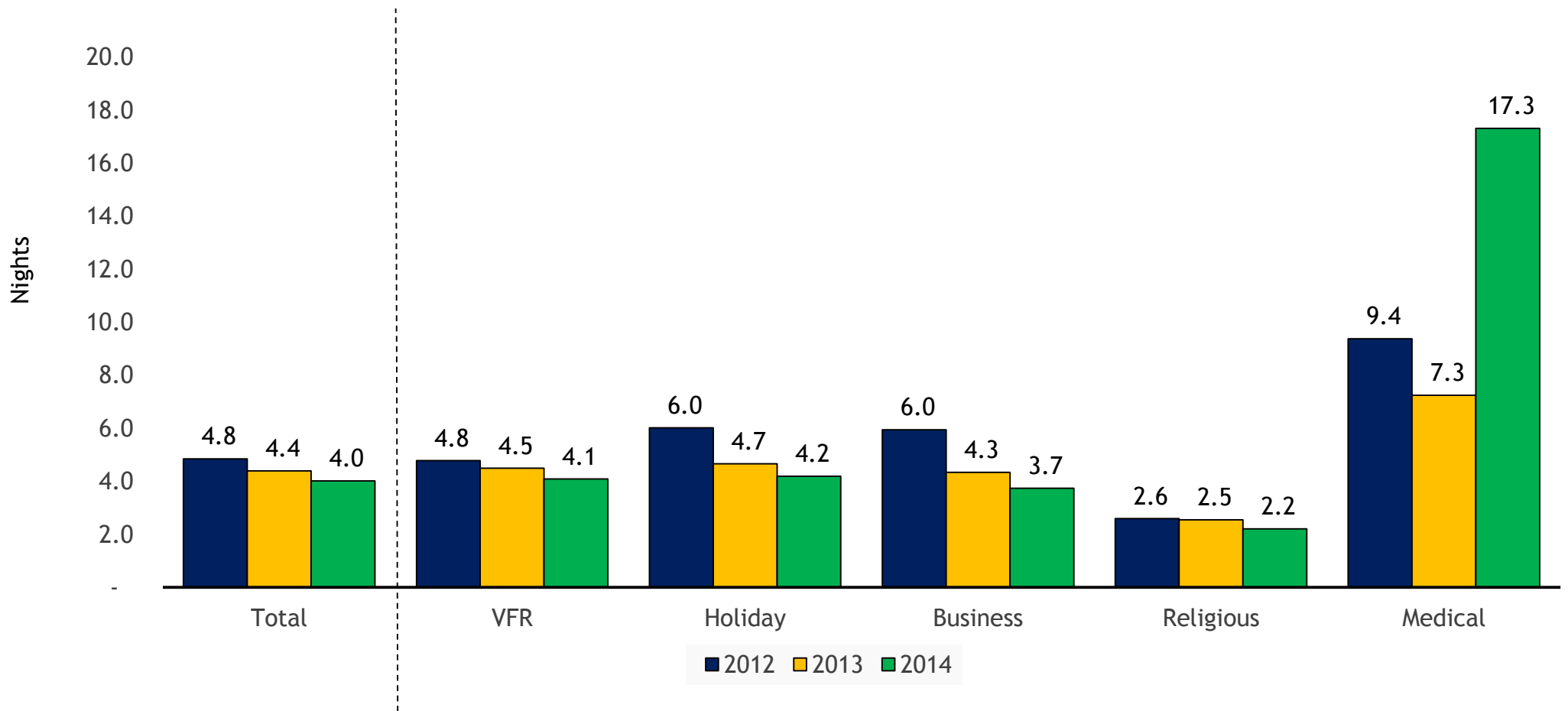
% growth '13 vs '12	-6,7%	10,8%	-4,8%	0,2%	-19,9%	-21,5%	2,1%	-38,9%	13,6%
% growth '14 vs '13	54,6%	-23,3%	7,4%	13,9%	73,8%	145,2%	-19,8%	50,2%	33,2%
CAGR '12 to '14	20,1%	-7,8%	1,1%	6,8%	18,0%	38,7%	-9,5%	-4,2%	23,0%

Source: SAT Domestic Surveys for 2012-2014

Note: *Trips to Provinces exceeds the total number of trips as one can go to more than one province in one trip

The length of a domestic trip was on average 4 nights in 2014, slightly lower than the 4,4 nights in 2013.

Average Nights by Purpose of Trip (in MM): 2012-2014



Unpaid accommodation is the most popular type of accommodation for domestic tourists

	2012	2013	2014
Total Domestic Bed-Nights (millions)	121.2	111.3	113.1

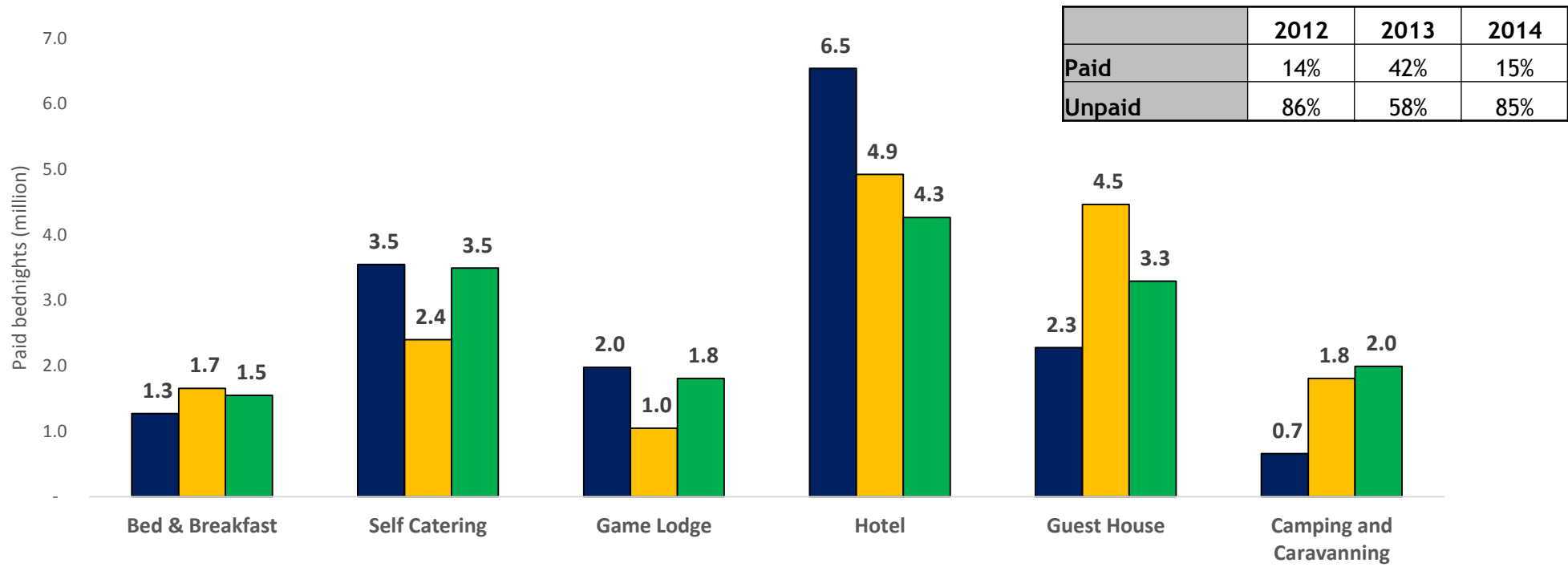
Bednights by Accommodation Type (million): 2012 - 2014



% growth '13 vs '12	-36.2%	-43.6%	30.5%	-32.4%	-47.0%	-24.7%	96.0%	173.2%
% growth '14 vs '13	47.4%	176.7%	-6.5%	45.5%	72.7%	-13.4%	-26.3%	10.1%
CAGR '12 to '14	-3.0%	24.9%	10.5%	-0.8%	-4.3%	-19.3%	20.2%	73.4%

Within the paid accommodation category, there were increases in the number of nights spent in self-catering establishments, game lodges and camping & caravan sites in 2014

Bednights in Paid Accommodation Type (million): 2012 - 2014

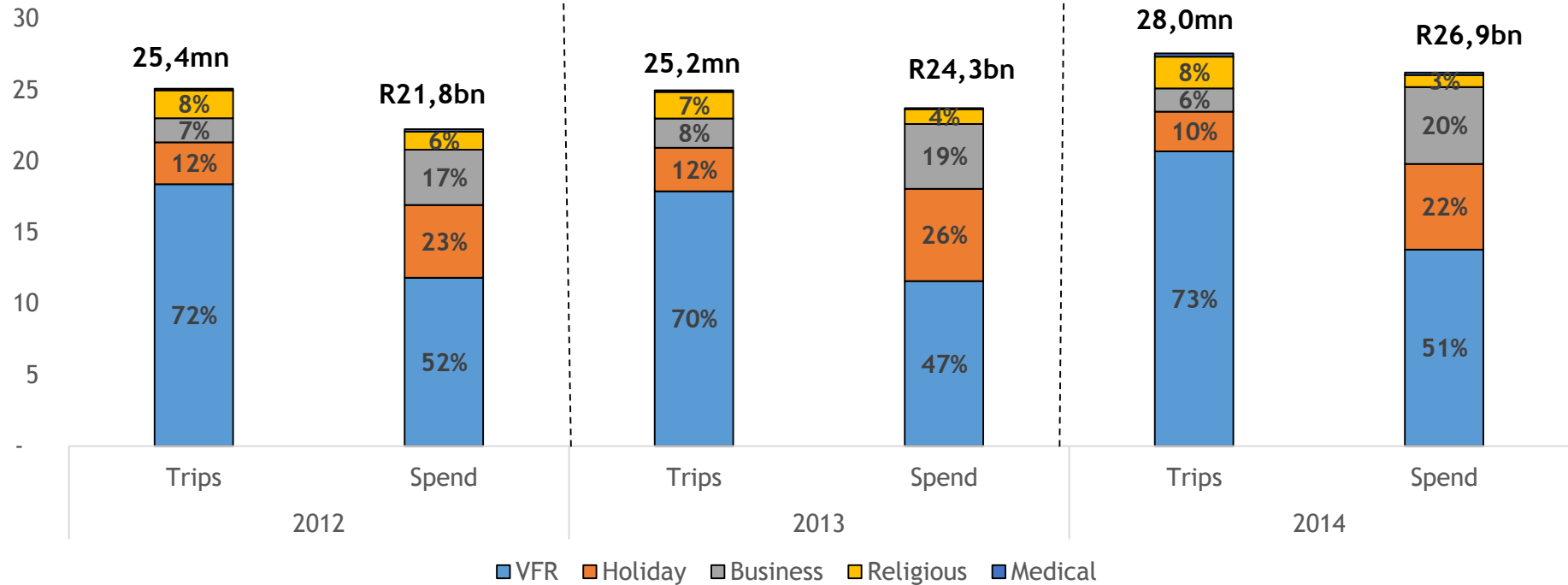


	2012	2013	2014
Paid	14%	42%	15%
Unpaid	86%	58%	85%

% growth '13 vs '12	30.5%	-32.4%	-47.0%	-24.7%	96.0%	173.2%
% growth '14 vs '13	-6.5%	45.5%	72.7%	-13.4%	-26.3%	10.1%
CAGR '12 to '14	10.5%	-0.8%	-4.3%	-19.3%	20.2%	73.4%

VFR trips were the largest contributor to total revenue generated by domestic tourism. This is as a result of the large number of VFR trips taken. However, despite accounting for 73% of trips, VFR contributed 51% to total revenue. Holiday and business trips have a greater contribution to total revenue despite their smaller share of total trips

Total domestic tourism revenue by purpose: 2012-2014

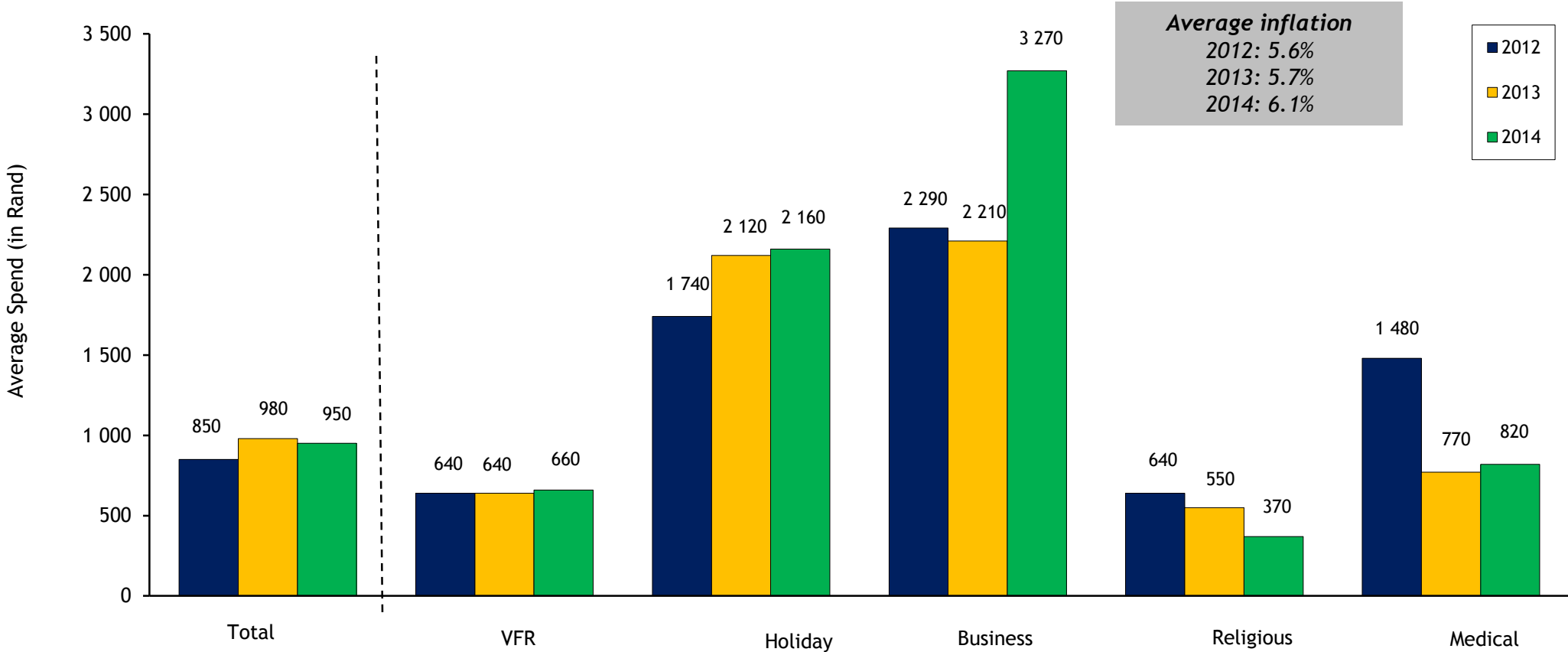


	2013 vs 2012		2014 vs 2013		CAGR	
	Trips	Spend	Trips	Spend	Trips	Spend
VFR	-3%	-2%	16%	19%	6%	8%
Holiday	4%	26%	-9%	-7%	-3%	8%
Business	21%	17%	-20%	19%	-1%	18%
Religious	-5%	-19%	20%	-18%	7%	-19%
Medical	0%	-48%	86%	100%	37%	2%

Note: Holiday includes sports (spectator) and shopping (personal); Business includes business (professional), business (MICE), shopping (resale) and sports (participant)
 Source: SAT Domestic Surveys for 2012-2014

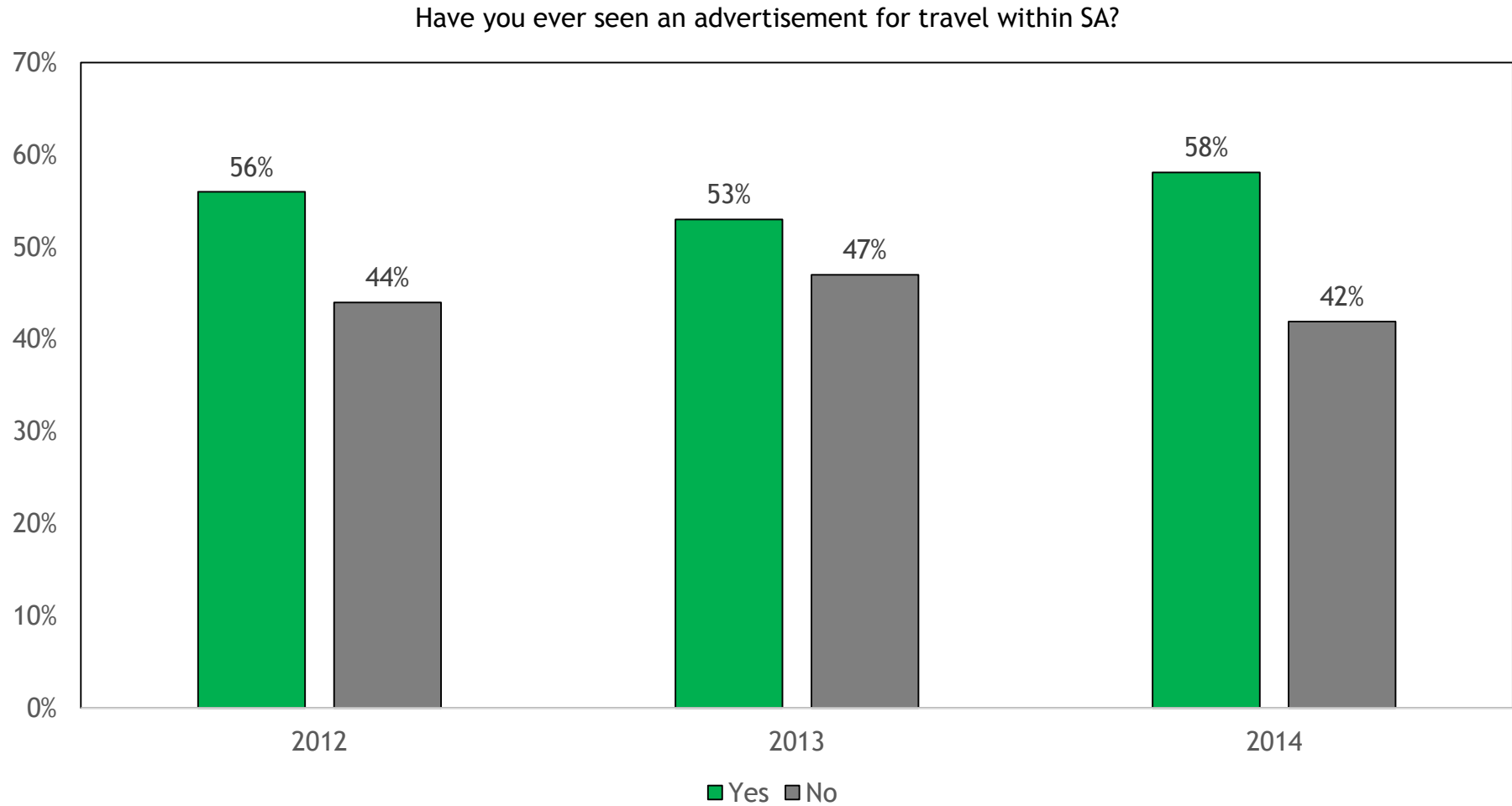
In nominal terms, the overall average spend per trip decreased by 3% from R980 in 2013 to R950 in 2014 following a significant decline in average spend in religious trips.

Average Spend per Trip by Purpose of Trip: 2012-2014



Note: Holiday includes sports (spectator) and shopping (personal); Business includes business (professional), business (MICE), shopping (resale) and sports (participant)
 Source: SAT Domestic Surveys for 2012-2014

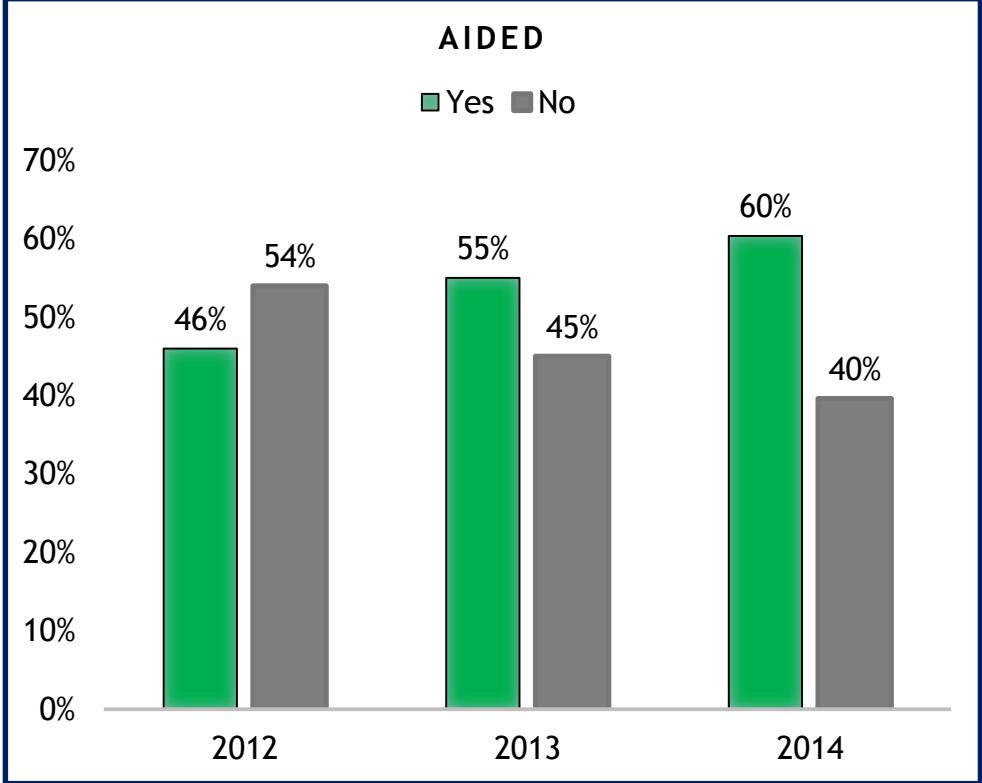
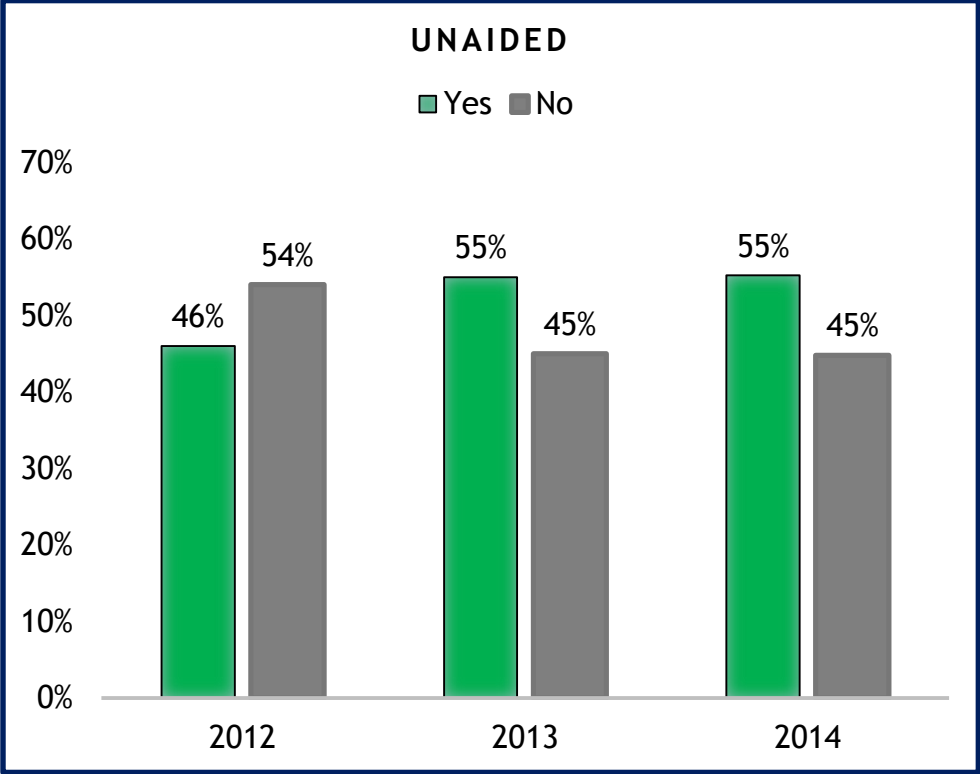
Recall of domestic travel ads was higher in 2014 compared to 2013



Note: Results presented are based on a general awareness question "Have you ever seen an advertisement for travel within SA?"
Source: SAT Domestic Surveys for 2012-2014

The recall of the Sho't Left Campaign remained the same when respondents were not prompted. However, when prompted, recall improved in 2014 compared to 2013

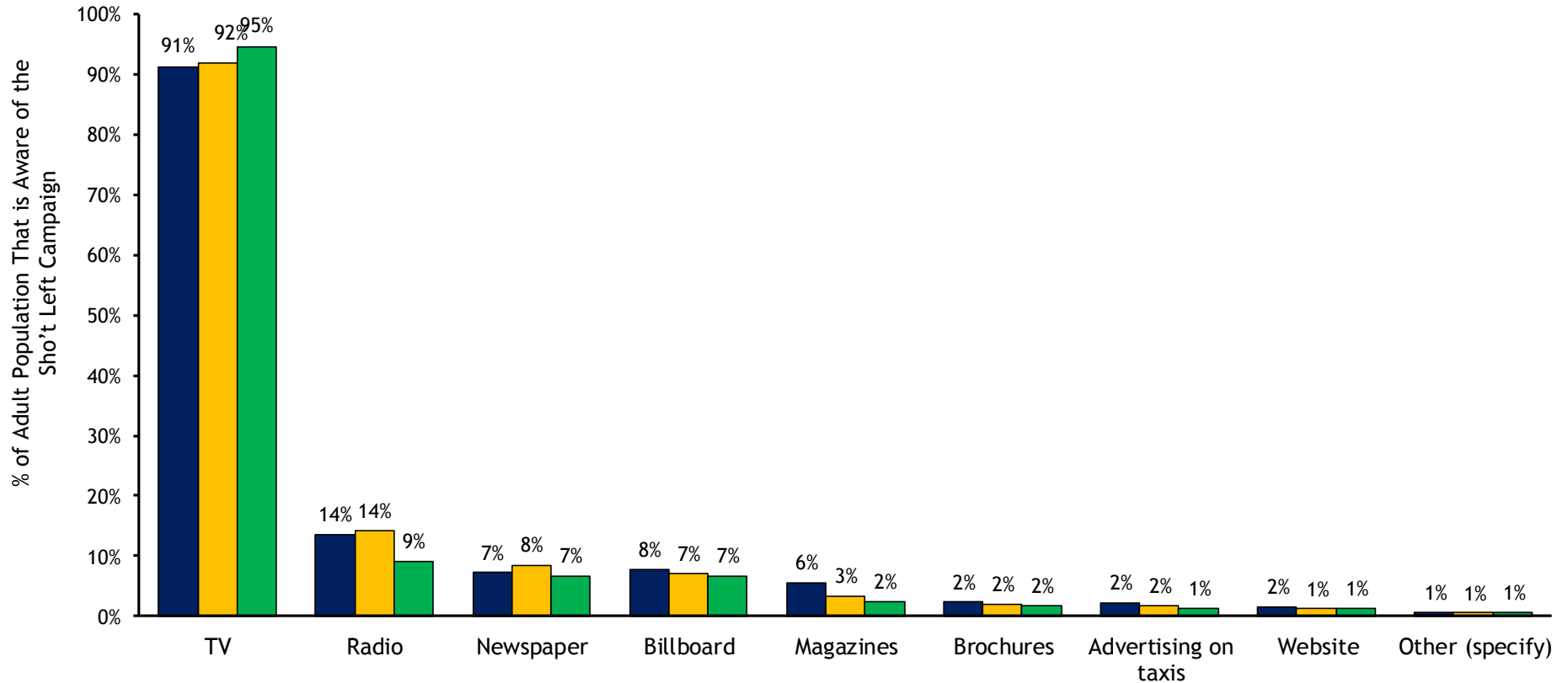
Have you ever seen or heard of the Sho't Left Campaign?



Note: Campaign results reflected in 2013 are strictly for the Sho't Left campaign, thus only data from September-December 2013 are reported on in this section.
Unaided recall refers to spontaneous or unprompted response. In the case of aided recall, imagery of a Sho't Left print ad and/or the Sho't Left logo is presented to respondent
Source: SAT Domestic Surveys for 2012-2014

Television is by far the most recognised medium through which South Africans learn about the Sho't Left Campaign

Where South Africans Saw/Heard the Sho't Left Campaign: 2012-2014¹



Note: Campaign results reflected in 2013 are strictly for the Sho't Left campaign, thus only data from September-December 2013 are reported on in this section.
Source: SAT Domestic Surveys for 2012-2014



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