



A JUMP INTO DOMESTIC ADVENTURE CONSUMER INSIGHTS

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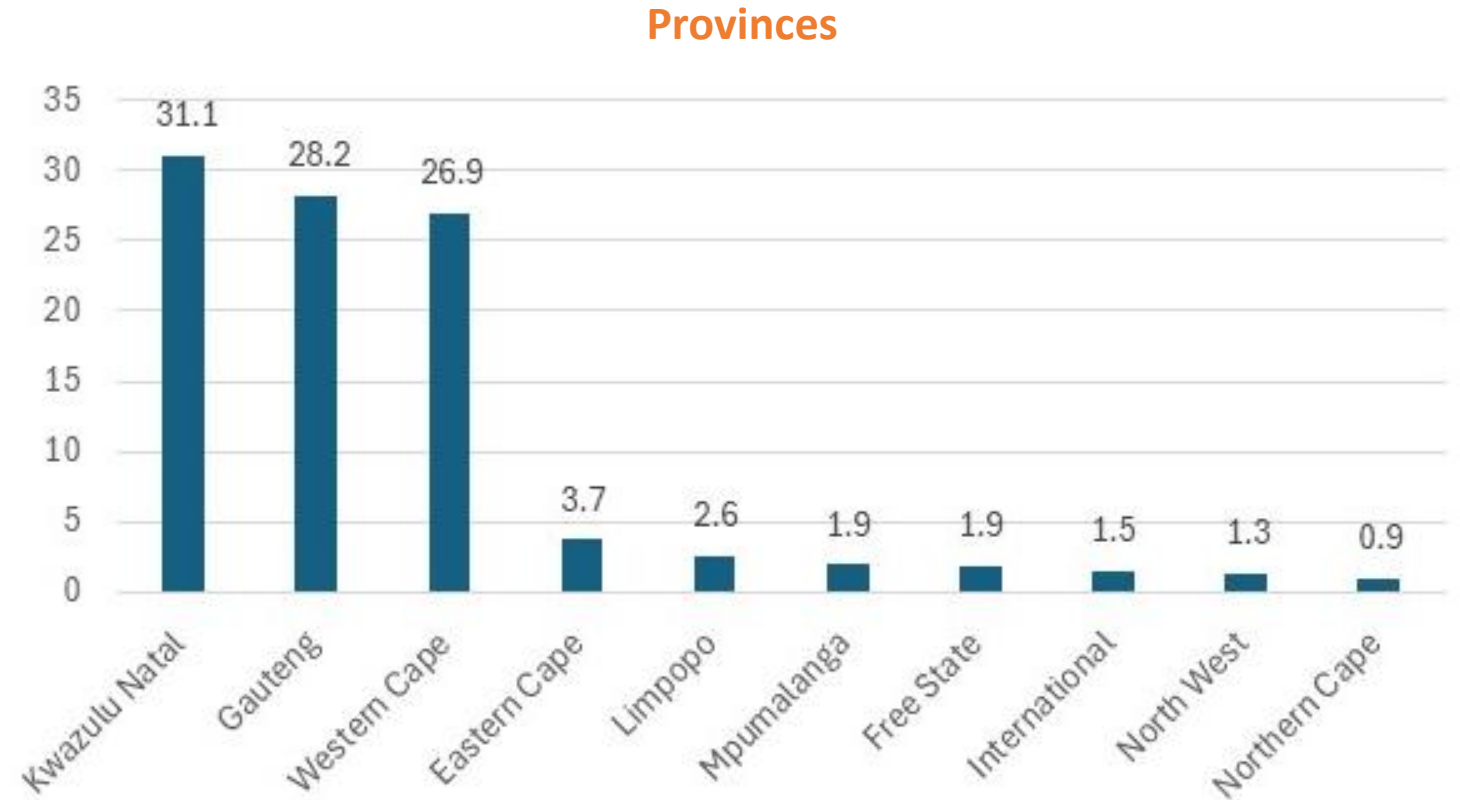
SATSA 
The Voice of Inbound Tourism

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Background and Context

The information used was obtained from entrants to the **101 Adventures Western Cape Competition**:

- The competition ran from 15 November 2023 to 15 January 2024
- A total of 36,603 entries were received, with around 7,000 respondents providing answers to most of the questions
- The majority of respondents hail from KwaZulu-Natal, followed by Gauteng and Western Cape
- 1.5% of the respondents were based outside South Africa



Travel Budget & Reason for Travel

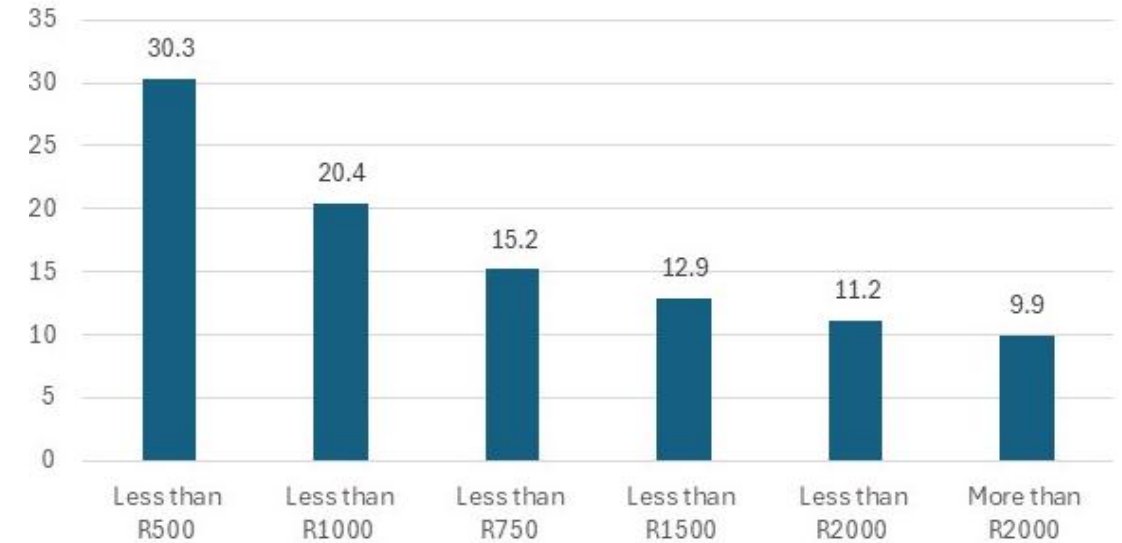
The respondents are frugal spenders:

- 30.3% of respondents had a budget of less than R500
- Only 9.9% of respondents had a budget of more than R2,000

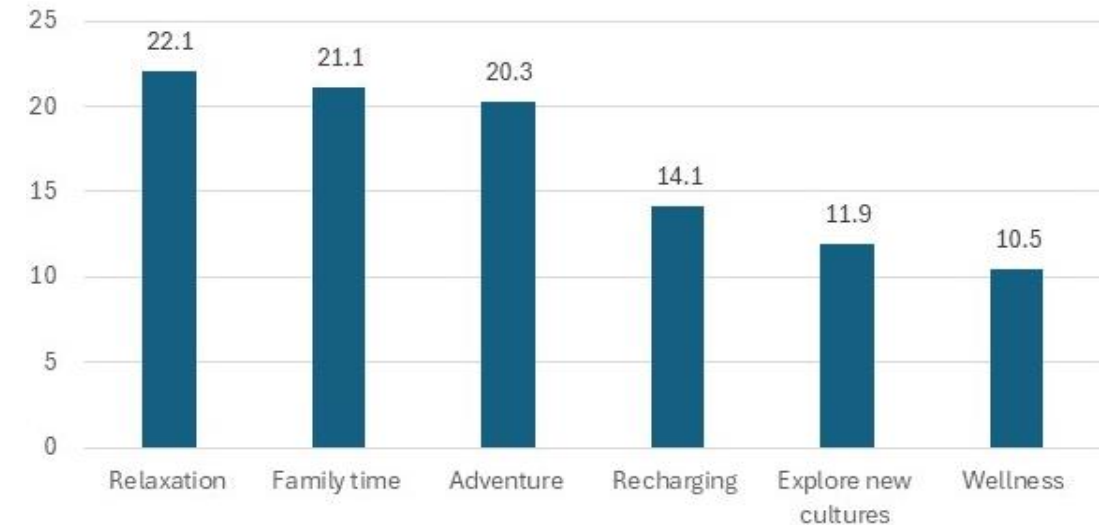
Adventure was not the only reason for travel. The respondents travel for a variety of reasons:

- Relaxation 21.2%
- Family time 21.1%
- Adventure 20.3%

Travel Budget per Person per Day



Reason for Holiday



Accommodation

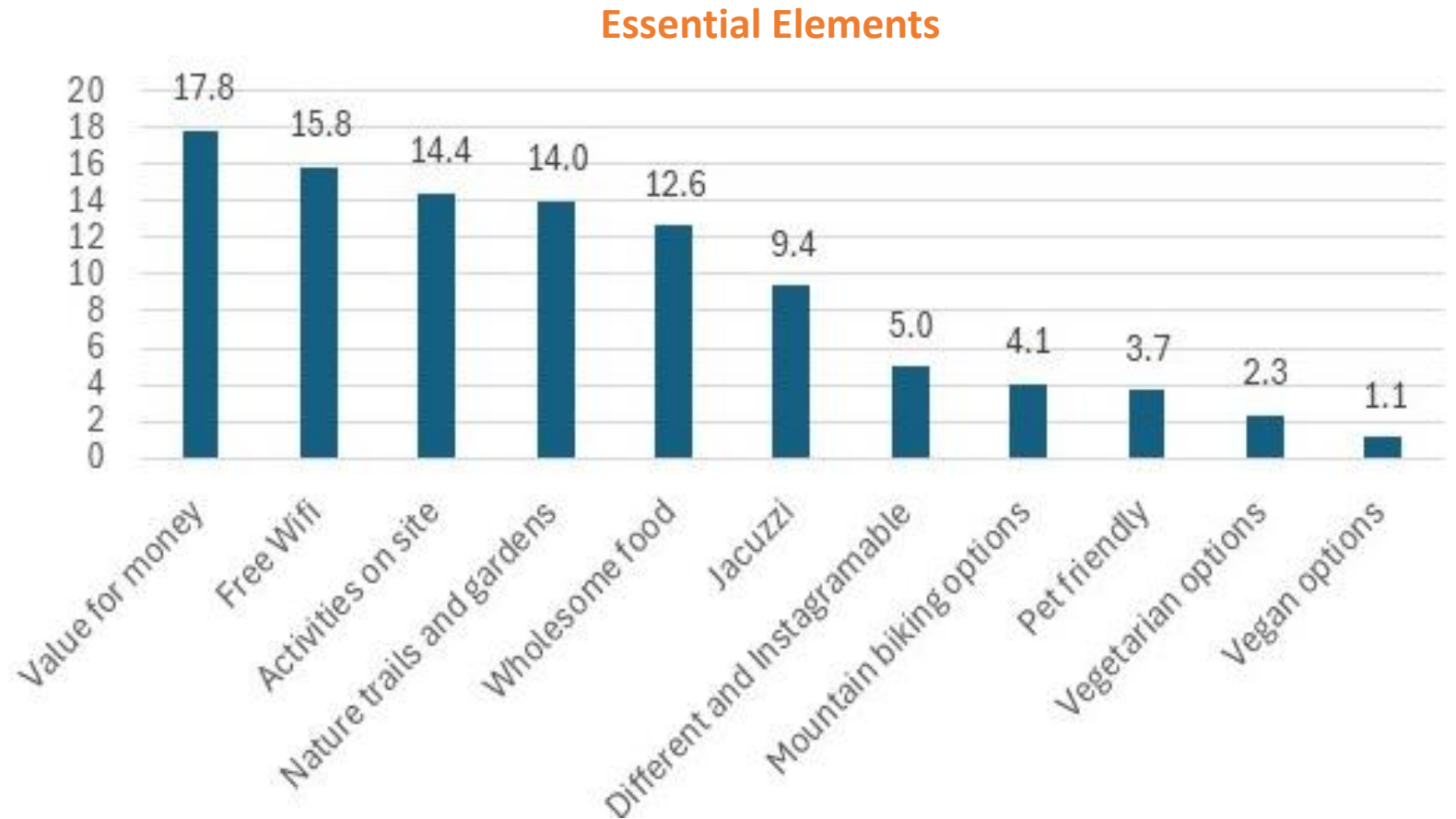
Respondents prefer a variety of accommodations:

- 21.2% of respondents utilised self-catering accommodation
- 17.4% of respondents utilised B&Bs
- 16% of respondents utilised Resorts
- 15.2% of respondents utilised Hotels



Facilities

Value for money is the most important element for respondents, followed by free Wi-Fi, on-site activities, nature trails and gardens, and wholesome food.

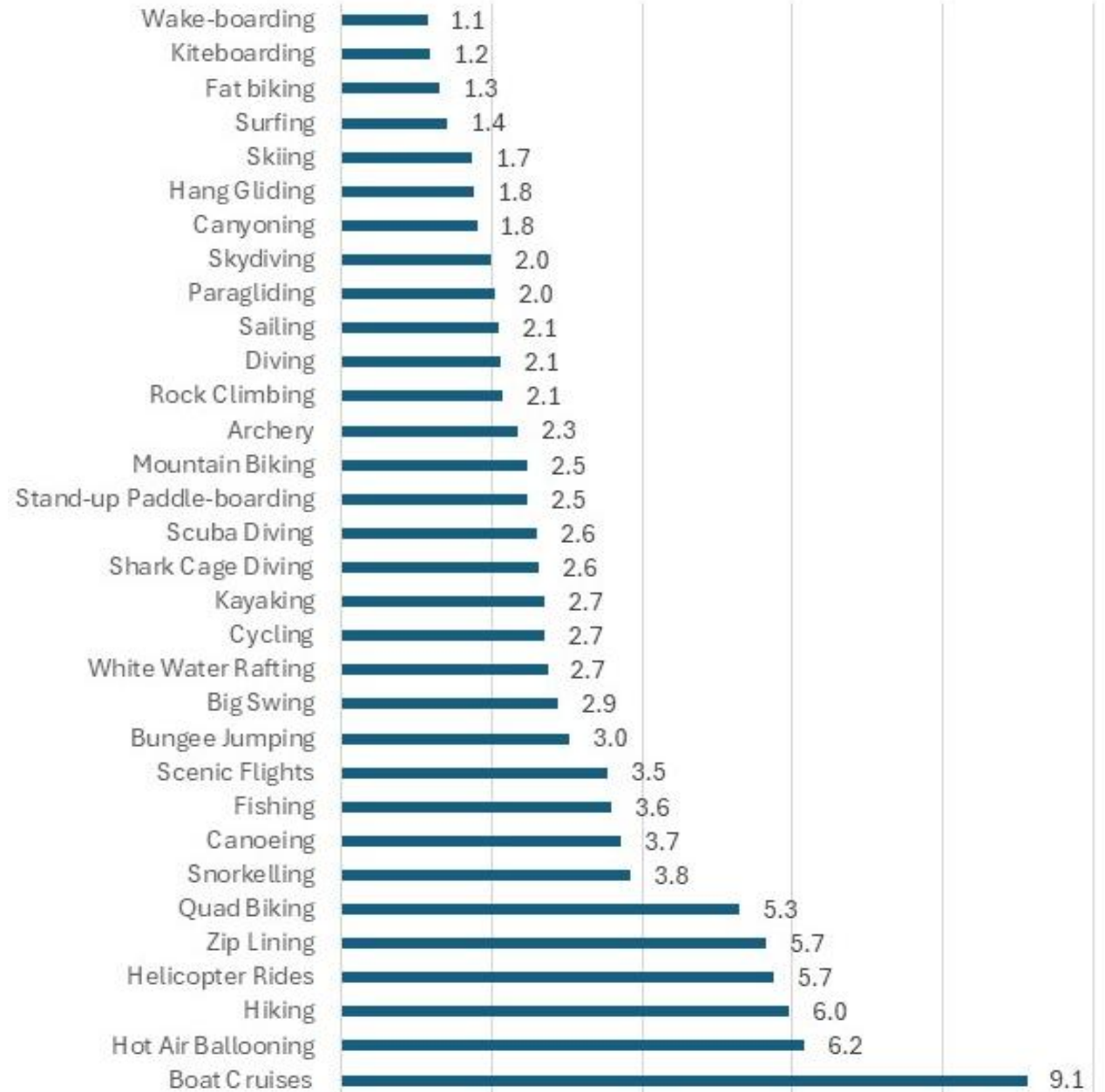


Type of Activities

Survey respondents could choose multiple activities.
The activities with the most responses were:

- Boat cruises (9.3%)
- Hot Air Ballooning (6.3%)
- Hiking (6.1%)
- Helicopter Rides (5.9%)
- Zip Lining (5.8%)
- Quad Biking (5.4%)

Top Adventure Activities

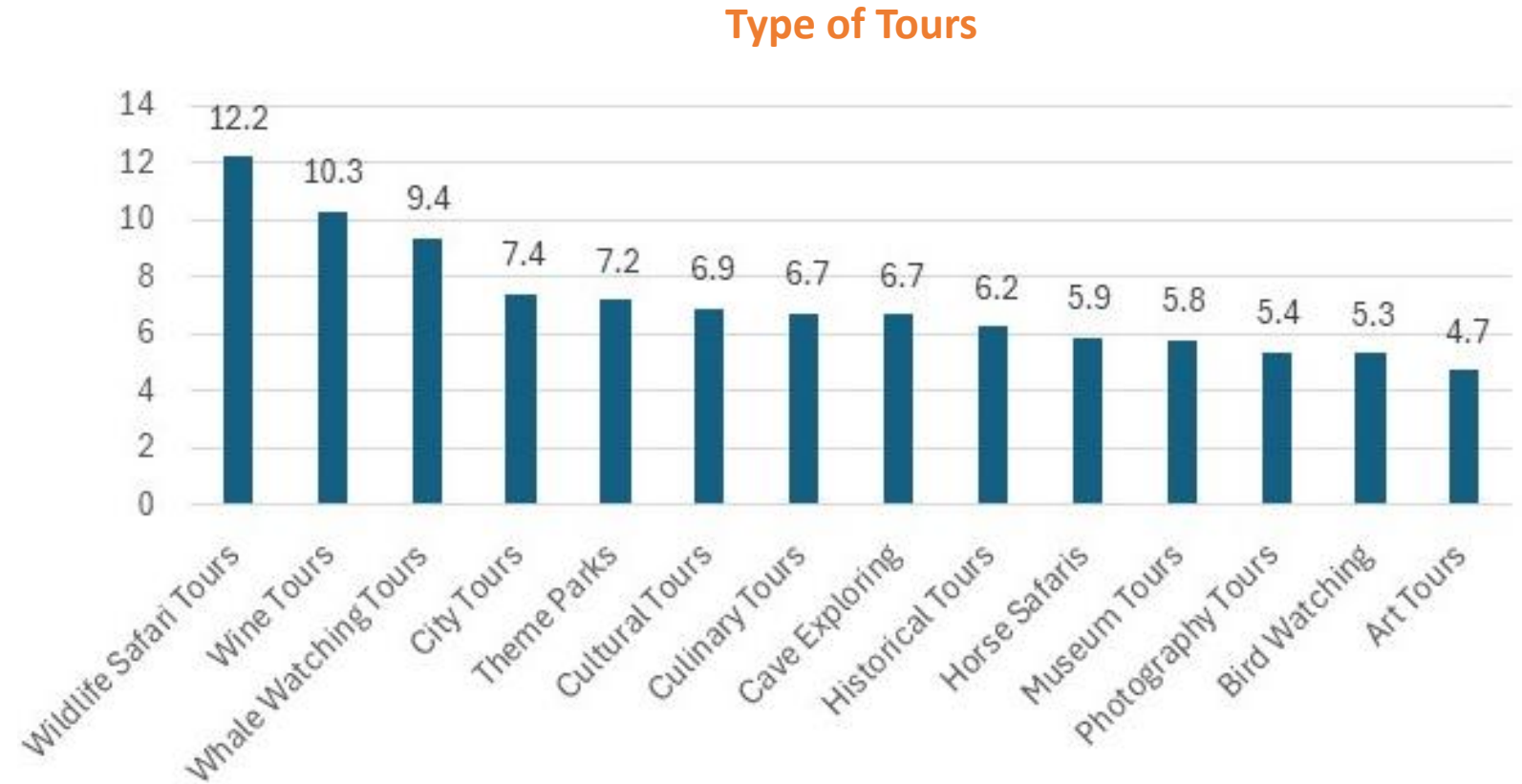


Type of Tours Interested In

The type of activities that respondents are interested in should be read in conjunction with the type of tours that they are interested in.

The most mentioned tours were:

- Wildlife Safari Tours (12.2%)
- Wine Tours (10.3%)
- Whale Watching Tours (9.4%)



Reason for Holiday by Origin

The results by origin indicate that the main reasons for holidays are:

- International – Exploring new cultures (21.9%)
- Eastern Cape – Relaxation (23.4%) & Family time (23.1%)
- Free State – Family time (23.9%) & Relaxation (22.5%)
- Gauteng – Relaxation (22.7%)
- KZN – Family time (21.6%), Relaxation (21.6%) & Adventure (21.4%)
- Limpopo – Adventure (24.9%)
- Mpumalanga – Relaxation (23.8%)
- North West – Relaxation (24.5%)
- Northern Cape – Family time (22.5%) & Relaxation (22.5%)
- Western Cape – Relaxation (21.9%) & Family time (21.3%)

Origin	Adventure	Explore new Cultures	Family Time	Recharging	Relaxation	Wellness
International	20.4%	21.9%	16.2%	12.1%	18.5%	10.9%
Eastern Cape	20.6%	11.3%	23.1%	12.1%	23.4%	9.6%
Free State	18.2%	9.8%	23.9%	16.1%	22.5%	9.5%
Gauteng	19.3%	12.2%	20.6%	15.0%	22.7%	10.3%
KwaZulu-Natal	21.4%	11.3%	21.6%	13.2%	21.6%	11.1%
Limpopo	24.9%	13.5%	20.9%	12.6%	20.9%	7.4%
Mpumalanga	20.9%	10.2%	19.9%	16.8%	23.8%	8.4%
North West	20.3%	11.0%	17.7%	16.0%	24.5%	10.5%
Northern Cape	20.5%	14.6%	22.5%	13.2%	22.5%	6.6%
Western Cape	19.8%	12.0%	21.3%	14.4%	21.9%	10.6%

Preferred Accommodation by Origin

The results by origin indicate that the preferred accommodation was mostly self-catering and B&B, with the following exceptions:

- Self-catering, B&B, and Lodges were equally important for international respondents
- Resorts, Hotels and B&Bs were most important for respondents from Limpopo
- Along with self-catering accommodation, Resorts were also important for respondents from North West and the Northern Cape

Origin	Airbnb	B&B	Camping	Hotel	Lodge	Resort	Self Catering
International	9.5%	18.2%	6.8%	14.8%	18.6%	14.0%	18.2%
Eastern Cape	7.5%	18.8%	7.8%	14.2%	14.5%	14.5%	22.7%
Free State	8.4%	17.7%	10.0%	11.3%	13.8%	16.7%	22.2%
Gauteng	8.6%	16.8%	6.8%	15.4%	14.7%	16.3%	21.4%
KwaZulu-Natal	9.6%	18.0%	7.0%	16.4%	11.6%	15.7%	21.7%
Limpopo	6.0%	17.6%	8.1%	17.9%	15.1%	19.1%	16.1%
Mpumalanga	6.8%	20.0%	8.2%	10.6%	15.3%	15.9%	23.2%
North West	10.5%	16.4%	6.4%	13.2%	14.6%	17.4%	21.5%
Northern Cape	11.7%	14.8%	7.8%	13.3%	10.9%	17.2%	24.2%
Western Cape	9.9%	17.0%	9.8%	14.4%	13.0%	15.6%	20.4%

Preferred Activity by Origin

The results by origin indicate that similar activities are preferred by respondents from different origins, with respondents from International, Mpumalanga, and North-West also preferring scenic flights.

Origin	International	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	North West	Northern Cape	Western Cape
Archery	1.4%	2.0%	3.1%	2.4%	2.6%	1.5%	2.9%	1.6%	1.1%	2.1%
Big Swing	1.6%	2.8%	2.5%	3.2%	3.3%	4.2%	3.8%	2.9%	4.0%	2.0%
Boat Cruises	8.6%	10.0%	8.0%	8.9%	9.6%	10.1%	8.8%	9.2%	10.8%	8.6%
Bungee Jumping	2.7%	3.5%	3.4%	3.0%	3.2%	3.8%	2.8%	3.7%	3.1%	2.7%
Canoeing	3.7%	4.0%	3.0%	3.4%	3.4%	2.2%	3.1%	3.3%	4.2%	4.6%
Canyoning	2.1%	2.0%	2.9%	1.7%	1.8%	1.7%	1.3%	2.2%	1.7%	1.9%
Cycling	3.8%	3.2%	1.9%	2.8%	2.6%	2.7%	2.4%	2.1%	2.3%	2.7%
Diving	1.8%	2.2%	2.6%	2.4%	1.9%	2.5%	1.8%	1.6%	0.8%	2.0%
Fat biking	1.3%	1.0%	1.3%	1.4%	1.1%	1.8%	1.5%	1.0%	0.8%	1.5%
Fishing	3.7%	4.0%	2.6%	3.2%	4.4%	3.7%	4.1%	4.0%	4.5%	3.1%
Hang Gliding	1.4%	1.5%	1.5%	1.8%	1.9%	1.2%	0.9%	2.7%	2.5%	1.6%
Helicopter Rides	5.9%	6.2%	5.9%	5.4%	6.1%	7.5%	5.6%	4.8%	7.1%	5.5%
Hiking	5.8%	6.3%	5.5%	6.0%	5.8%	5.4%	6.8%	6.5%	5.1%	6.0%
Hot Air Ballooning	6.9%	5.7%	6.2%	6.2%	6.5%	6.8%	6.4%	6.0%	5.4%	5.7%
Kayaking	3.2%	1.9%	2.9%	2.5%	2.3%	1.7%	2.3%	2.2%	2.0%	3.7%
Kiteboarding	1.8%	1.4%	1.9%	1.1%	1.2%	1.3%	1.0%	1.0%	0.8%	1.1%
Mountain Biking	2.4%	2.6%	2.1%	2.6%	2.4%	3.1%	2.6%	2.4%	2.8%	2.4%
Paragliding	2.1%	1.3%	1.7%	2.1%	1.8%	1.6%	1.7%	1.9%	1.4%	2.4%
Quad Biking	5.0%	5.8%	5.0%	5.6%	5.0%	6.2%	6.5%	6.2%	6.2%	5.1%
Rock Climbing	1.8%	2.3%	3.0%	2.4%	2.1%	2.3%	1.7%	1.9%	2.3%	1.9%
Sailing	1.8%	2.0%	2.8%	2.1%	2.1%	1.5%	1.6%	1.9%	1.7%	2.3%
Scenic Flights	5.3%	2.8%	3.6%	3.3%	3.7%	2.9%	2.7%	2.5%	4.2%	3.7%
Scuba Diving	2.1%	2.8%	3.2%	2.7%	2.5%	3.0%	2.0%	2.7%	2.0%	2.6%
Shark Cage Diving	3.0%	2.9%	2.9%	2.7%	2.4%	2.2%	3.0%	3.2%	2.5%	2.7%
Skiing	1.3%	1.6%	1.8%	1.7%	1.9%	1.3%	1.9%	2.2%	0.8%	1.6%
Skydiving	2.1%	2.2%	1.9%	2.1%	1.7%	3.1%	1.7%	2.1%	2.3%	2.0%
Snorkelling	5.0%	3.3%	3.1%	3.9%	3.8%	2.7%	5.4%	4.9%	3.1%	3.9%
Stand-up Paddle-boarding	2.7%	2.0%	3.0%	2.3%	2.2%	1.9%	2.4%	1.3%	2.0%	3.1%
Surfing	1.1%	1.2%	0.6%	1.2%	1.4%	0.9%	1.3%	1.7%	1.4%	1.7%
Wake-boarding	1.3%	0.8%	1.2%	1.1%	1.0%	1.2%	0.8%	1.0%	1.4%	1.4%
White Water Rafting	2.4%	2.6%	4.2%	2.9%	2.6%	2.9%	3.1%	3.0%	3.1%	2.6%
Zip Lining	5.3%	6.1%	5.1%	5.8%	5.6%	5.1%	6.2%	6.5%	6.2%	5.6%

Preferred Tour by Origin

The results of the preferred tour by origin indicate the popularity of wildlife safari tours, wine tours and whale watching tours, with the following exceptions:

- International respondents are also interested in cultural tours, city tours and culinary tours
- City tours are also popular amongst respondents from the Free State, Limpopo, Northern Cape and Western Cape

	International	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	North West	Northern Cape	Western Cape
Art Tours	5.2%	4.4%	4.9%	4.9%	4.5%	5.3%	5.1%	5.9%	4.4%	4.7%
Bird Watching	5.2%	4.4%	3.4%	5.2%	6.0%	5.4%	5.4%	5.6%	6.2%	4.8%
Cave Exploring	5.7%	6.3%	7.9%	6.8%	7.1%	6.4%	5.7%	6.8%	6.2%	6.1%
City Tours	7.6%	7.8%	8.5%	6.8%	7.3%	8.1%	6.9%	7.7%	8.4%	8.1%
Culinary Tours	7.3%	7.5%	7.1%	6.6%	6.3%	4.9%	5.3%	6.1%	5.1%	7.5%
Cultural Tours	8.8%	7.0%	6.7%	6.8%	6.4%	7.2%	5.8%	6.3%	6.9%	7.4%
Historical Tours	6.3%	6.8%	6.2%	6.1%	6.5%	7.2%	7.7%	4.5%	4.0%	5.8%
Horse Safaris	5.7%	5.3%	6.2%	6.0%	5.9%	7.3%	5.5%	6.1%	5.5%	5.7%
Museum Tours	4.8%	6.0%	6.7%	5.9%	5.5%	5.6%	7.2%	5.0%	5.1%	5.9%
Photo-graphy Tours	5.9%	5.7%	4.4%	5.5%	5.5%	5.3%	4.2%	6.1%	6.2%	5.0%
Theme Parks	3.6%	6.9%	7.2%	7.8%	7.3%	6.6%	7.2%	7.0%	6.6%	6.6%
Whale Watching Tours	9.5%	9.4%	8.2%	9.4%	9.3%	8.1%	10.4%	9.5%	12.4%	9.4%
Wildlife Safari Tours	13.5%	11.9%	10.8%	11.8%	12.5%	12.3%	11.2%	12.2%	12.8%	12.4%
Wine Tours	10.9%	10.6%	11.5%	10.3%	9.8%	10.2%	12.3%	11.5%	10.2%	10.7%

Essential Elements by Origin

The results of the essential elements by origin indicate the importance of value for money, free Wi-Fi, Activities on site, nature trails, gardens and wholesome food.

Origin	Internati onal	Eastern Cape	Free State	Gauteng	KwaZulu- Natal	Limpopo	Mpumala nga	North West	Northern Cape	Western Cape
Activities on site	12.5%	13.6%	15.0%	14.3%	14.5%	15.5%	14.3%	15.3%	13.4%	14.3%
Different & Instagramable	7.3%	4.9%	3.5%	5.5%	4.5%	5.6%	5.7%	4.8%	4.6%	4.8%
Free Wifi	16.8%	16.5%	19.3%	15.8%	15.4%	16.3%	15.2%	16.6%	14.9%	16.1%
Jacuzzi	5.5%	9.5%	9.7%	9.5%	8.5%	9.9%	9.1%	10.5%	9.8%	10.4%
Mountain biking options	3.7%	4.3%	3.2%	4.3%	4.2%	6.9%	4.2%	4.8%	4.1%	3.3%
Nature trails and gardens	14.7%	14.0%	13.9%	14.2%	13.4%	13.5%	14.8%	14.4%	13.9%	14.3%
Pet friendly	1.8%	3.3%	4.6%	3.4%	4.0%	2.2%	3.0%	3.5%	4.1%	3.8%
Value for money	18.3%	17.6%	16.6%	17.5%	18.1%	15.7%	18.4%	16.9%	16.5%	18.1%
Vegan options	0.6%	0.6%	1.1%	1.2%	1.3%	1.0%	1.3%	1.0%	1.5%	0.9%
Vegetarian options	2.4%	1.3%	1.3%	2.2%	3.1%	1.6%	1.7%	1.3%	3.1%	1.9%
Wholesome food	16.2%	14.3%	11.8%	12.3%	13.0%	11.7%	12.4%	10.9%	13.9%	12.2%

Reason for Travel by Spend

Respondents spending more than R2000 are more likely to be visiting for adventure, to explore new cultures and for wellness.

Respondents spending less than R500 are more likely to be visiting for relaxation, family time and adventure.



Accommodation Preference by Spend

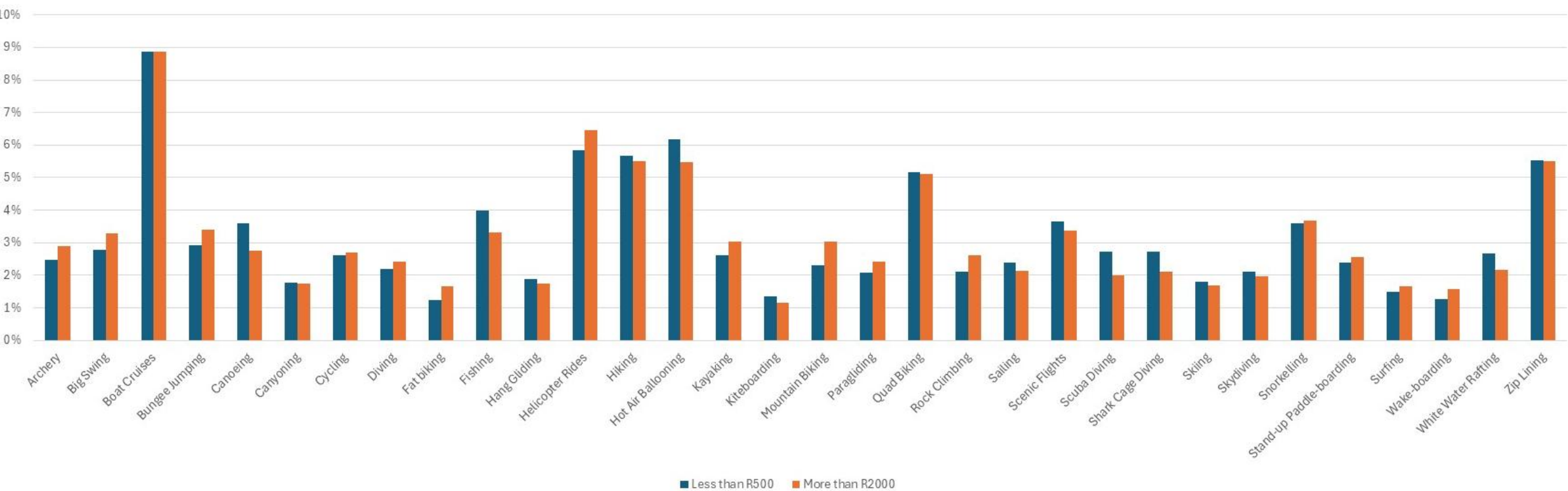
Respondents spending more than R2000 are more likely to utilise hotels and self-catering.

Respondents spending less than R500 are more likely to utilise self-catering and B&Bs.



Preferred Activity by Spend

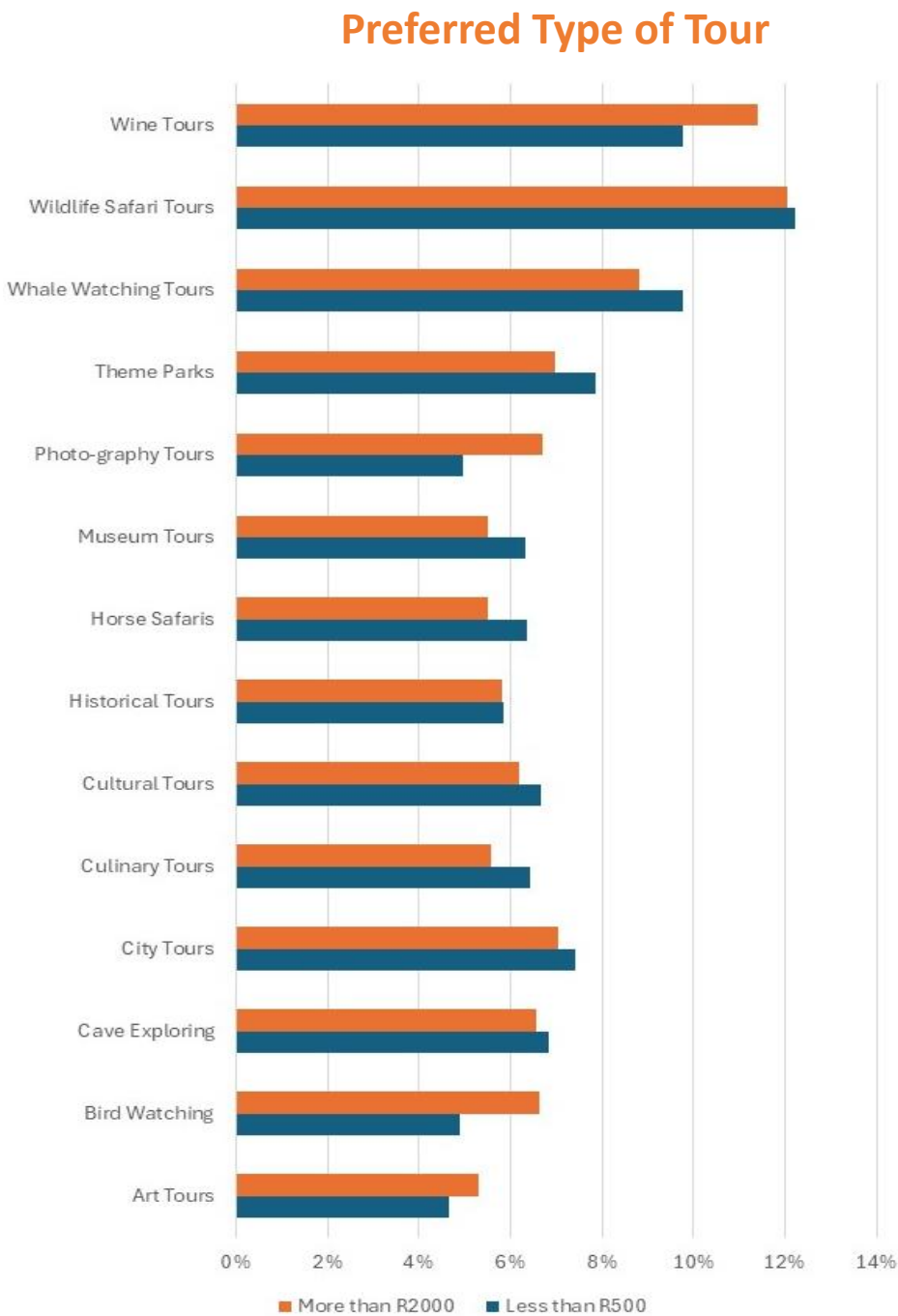
The activity preference between respondents spending less than R500 and more than R2000 are very similar.



Tour Preference by Spend

The tour preferences between respondents spending less than R500 and more than R2000 are very similar, with the only exceptions being the following tours that have a higher preference by respondents spending R2000 or more:

- Bird Watching
- Photography Tours
- Wine Tours



Essential Elements by Spend

The essential elements show variances between respondents who spend less than R500 and those who spend more than R2000, with value for money and activities on site being less important for the higher budgets.

Mountain biking, wholesome and vegan/vegetarian food, were more critical, along with a jacuzzi and Instagrammable locations.

