

~ HOLIDAY TRENDS FOR DECEMBER 2017 ~

Lightstone Data Provides Insight on South African's Holiday Patterns and Preferences

[Lightstone Explore](#), one of South Africa's leading providers of geospatial analytics, together with [Tracker](#), analysed the driving behaviour of 150 000 South African commuters where vehicles are fitted with telemetry devices. The analysis measured vehicles from 1 to 31 December 2017.

From the vehicles analysed, Lightstone analysts could draw some interesting conclusions:

- Overall
 - 58% of vehicles stayed at home and were driving around locally during the holiday period
 - 20% of vehicles were used to drive to holiday destinations
 - 22% of vehicles were not driven for extensive periods, thought to belong to families who either flew to their destination, or used their other car to drive to their destination

- Specifically:
 - vehicles owned by those living in wealthier areas, 60% had owners who went away for the holiday.
 - 36% of vehicles generally located in less affluent areas had owners who went away for the holiday.

Lightstone examined the data set provided by Tracker to deliver views on destinations and service stations most frequented, driver behaviour of various car brands, as well as which malls were most prevalent over the 2017 festive season.

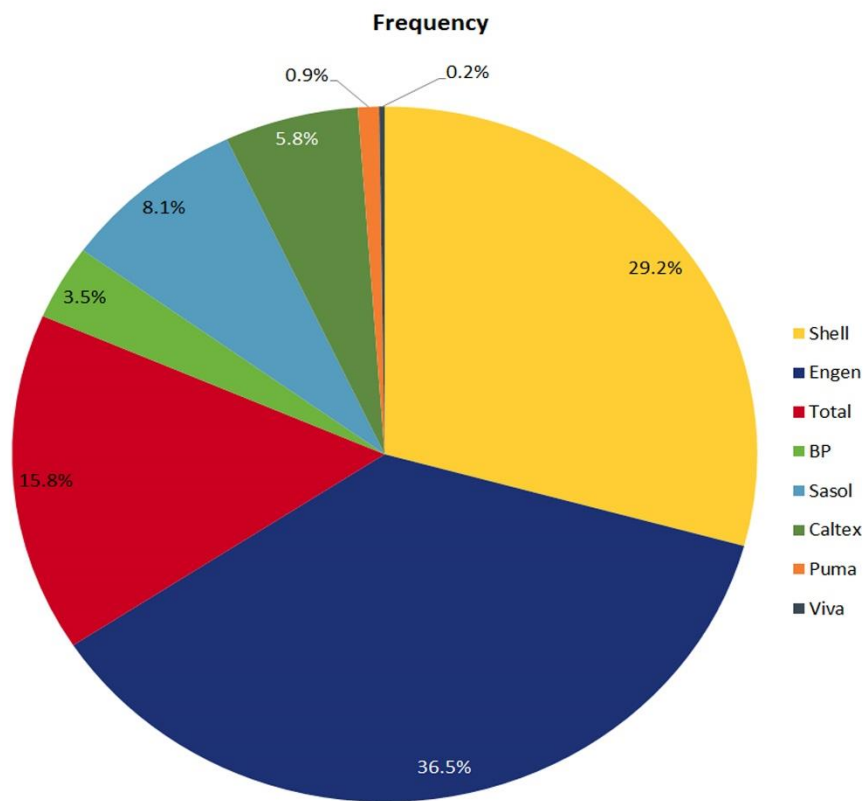
Destinations

It's no surprise that the most visited province by car is Kwazulu Natal. Interestingly, the second most popular destination is Limpopo followed by the Eastern Cape and then the Western Cape. The least popular destinations to visit over this period was the Free State and the Northern Cape. Coastal residents living in Kwazulu Natal, Western Cape and the Eastern Cape

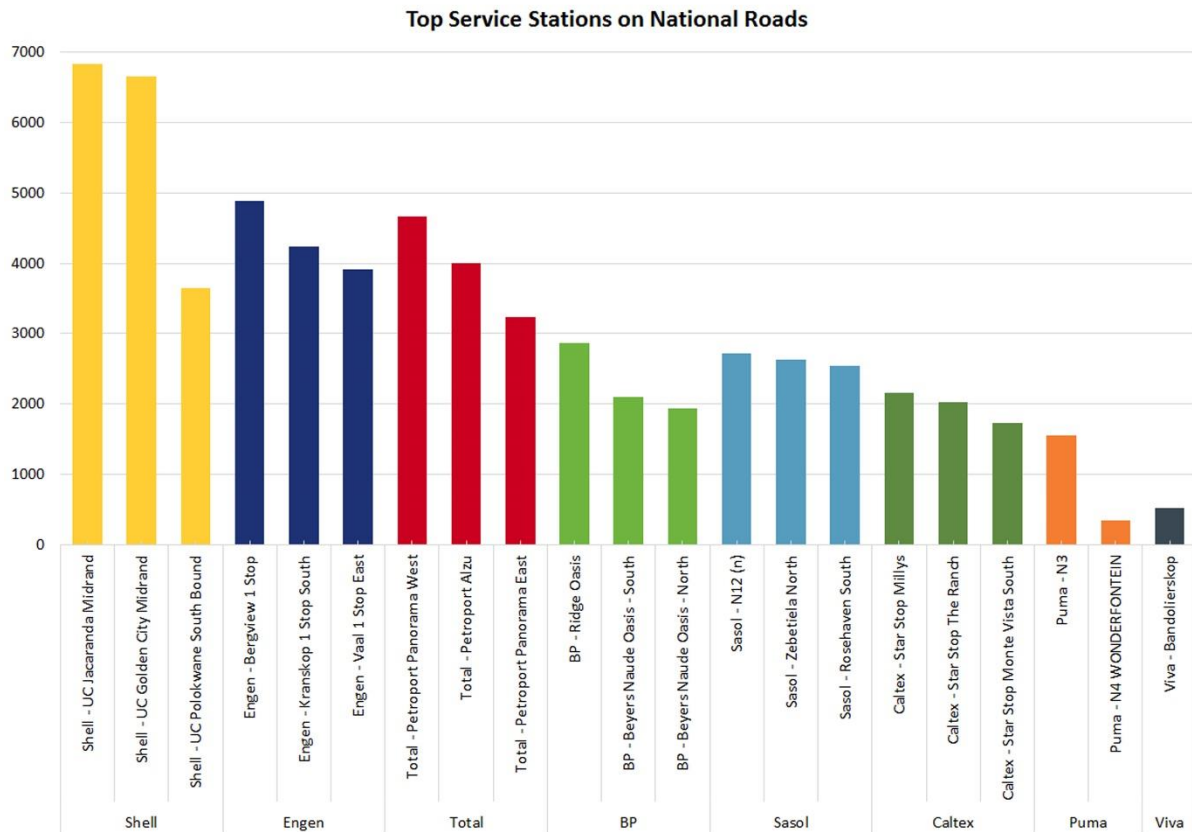
were less likely to travel due to their proximity to the beach, however inhabitants of Gauteng, the Free State and the Eastern Cape were most likely to travel.

Service Stations

From the findings, Engen and Shell stations are seen to enjoy the most visits from holiday makers over the December period with 37% and 30% of overall visits recorded respectively. This can (to a large degree) be attributed to their large footprint along the most popular routes. Sasol (earmarked as the most popular day-to-day service station in 2017) only had 8% of the visits over this period, mostly as a result of their limited footprint along the major holiday routes.



The below table indicates top service stations on national roads linked to the designated brand.



As part of the government's road safety initiatives drivers were implored to make frequent stops during their journey in order to reduce fatalities. Looking at the durations of stops along the N3 to Kwazulu Natal the following findings have been highlighted:

- Average time spent at service stations was 20 minutes
- Only 15% of drivers stopped for five minutes
- 65% of drivers rested for five to 30 minutes
- 20% of drivers stopped for more than 30 minutes

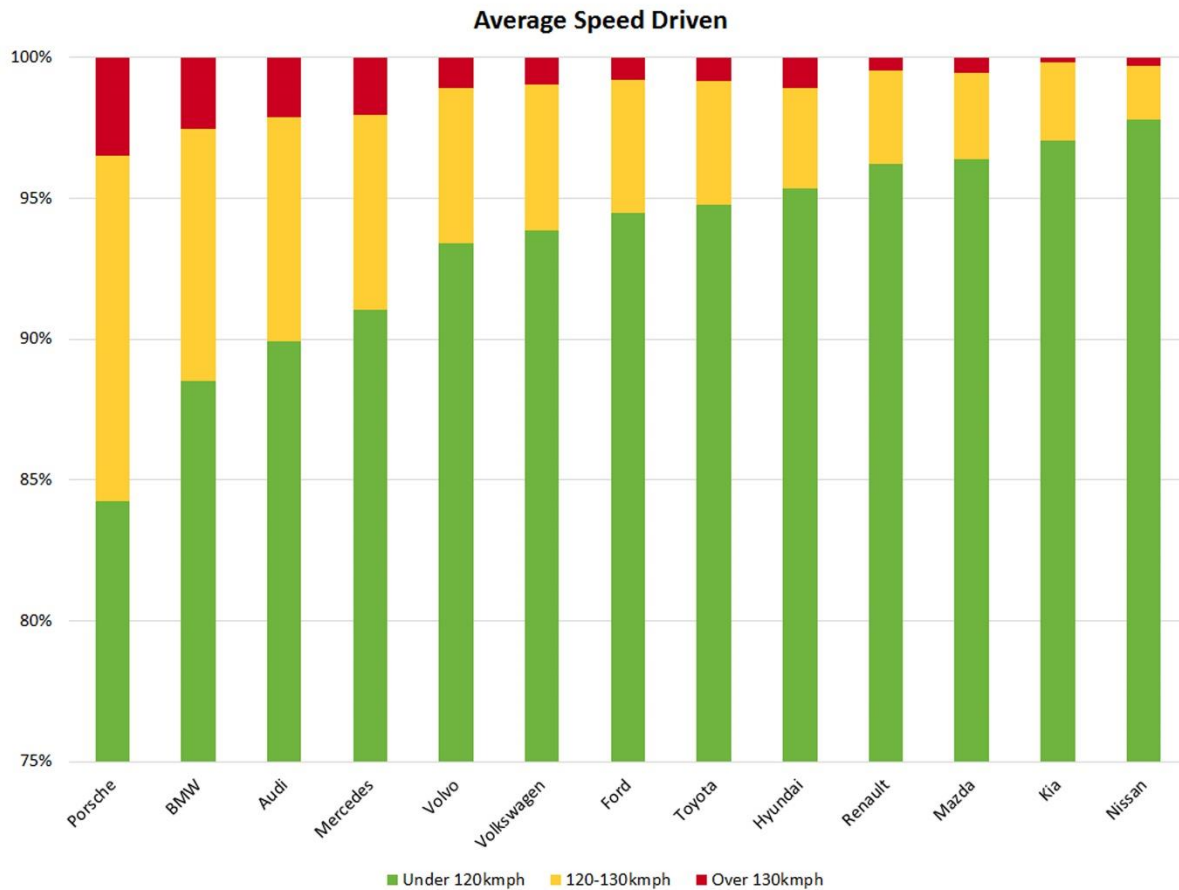
Of the service stations on this route Engen Bergview and Shell Ultra City in Montrose were the two most popular stops. Both service stations enjoy traffic in both directions which would explain this finding in part, however, they also boasted the longest average period of stopping times with Engen at 33 minutes and Shell at 26 minutes. The Shell Ultra City in Harrismith was the poorest performer overall.

Vehicle Brands

Owners of luxury branded vehicles like Porche, Volvo, Lexus, Jaguar, Mercedes and Mini were most likely to fly to their holiday destination.

Owners of Mazda, Ford, Isuzu and Renault were most likely to drive to their destinations and Opel, Chevrolet, Honda and Hyundai owners were most likely to stay at home.

The following graph indicates the profile of drivers' average speed where the trip distance was greater than 100km.



Shopping Centres

Most individuals will visit a mall at least once during the holiday period. The below graph rates the most visited shopping centres over December 2017:

The increase in number of visits indicates the escalation from November to December 2017. It is expected that the number of visits increase at the coast with the migration of inland visitors. Dwell Time percentages indicate the increase in the duration of visits in specific centres with Gateway Theatre of Shopping achieving the highest lift. This can be credited mostly to its sheer size but also to the mix of offerings the shopping centre has for the entire family.

City	Mall	December visits	Increase in number of visits	Increase in dwell time
Johannesburg	Sandton City & Nelson Mandela Square	44 631	3%	-2%
Pretoria	Menlyn Park Shopping Centre	43 651	18%	24%
Durban	Gateway Theatre of Shopping	41 728	33%	50%
Johannesburg	Mall of Africa	39 999	19%	24%
Pretoria	Wonderpark Shopping Centre	35 148	9%	10%
Cape Town	V & A Waterfront Victoria Wharf	32 406	13%	18%
Durban	The Pavilion - Westville	31 212	29%	42%
Johannesburg	Cresta Shopping Centre	30 946	9%	10%
Johannesburg	Clearwater Mall	29 798	22%	32%
Akasia	Kolonnade Shopping Centre	29 651	8%	14%
Bedfordview	Eastgate Shopping Centre	29 224	15%	23%
Pretoria	Woodlands Boulevard	25 397	5%	16%

Of the sample size it was found that Fridays or Saturdays were the most common days to leave for a destination and Mondays and Tuesdays the least popular.

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About Lightstone:

Lightstone is a provider of comprehensive data, analytics and systems on property, automotive and business assets. Lightstone has access to unique and proprietary data sets which allow it to build sophisticated analytics and spatial models to deploy various technologies to a range of industries. Our analytical, business and industry expertise is paired with our technical excellence to guide clients in managing risk and making business critical decisions. For more information, please visit:

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