



UNLOCKING THE
GERMAN MARKET

BY SAT INSIGHTS UNIT



SOUTH AFRICAN TOURISM



Germany facts



Frankfurt: 10h 55m (JHB direct)

Hamburg

Berlin

LAND MASS
357 592km²

Frankfurt

Munich



POPULATION
83.2-million (2022)
Most populous country in the EU, and second in Europe (after Russia)

CURRENCY
Euro (€)
Exchange rate:
R18.17 to €1 (2022)

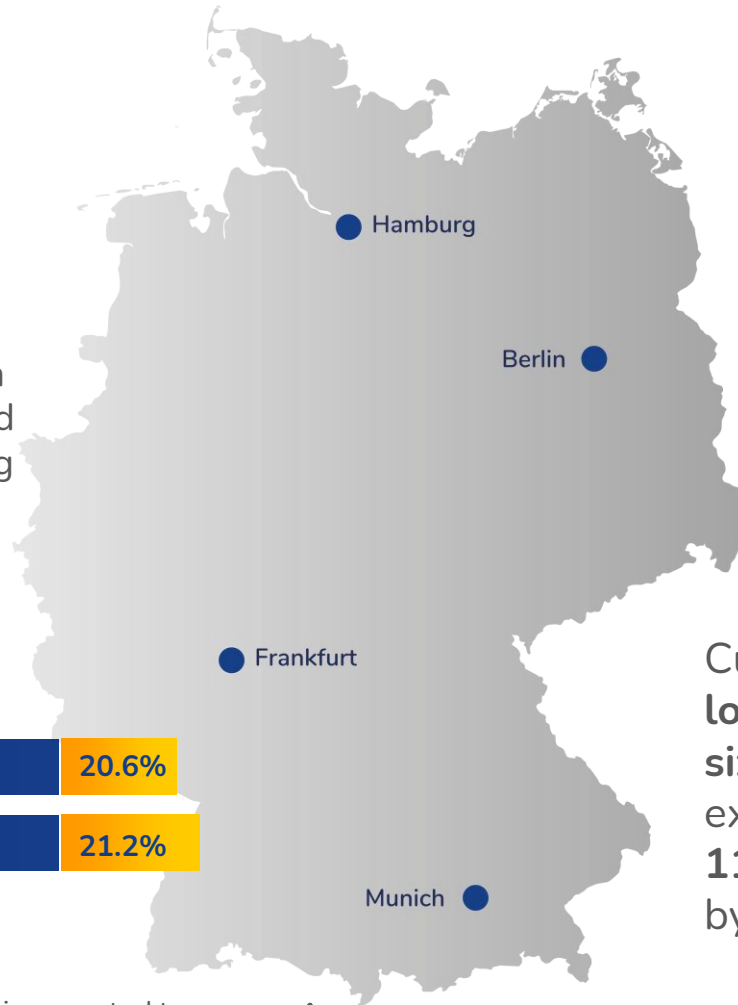


Nominal
GDP
per capita
\$48 398
(2022)

German travel status

With **long-haul** annual travel growth of **20.6%** (2022-2025), and outbound travel to **sub-Saharan Africa** growing annually by **21.2%** (2022-2025), Germany is a **strong market** for South Africa

Annual travel growth



Long-haul travel is expected to **recover to 2019 levels by 2026**

2026

Pre-pandemic German arrivals to South Africa peak in **October**. However, in 2021 and 2022 travel to SA Peaked in **November**. **February and March** are the other months with high volumes of German tourists. **June** is consistently a low season for the Germans as that is their summertime.

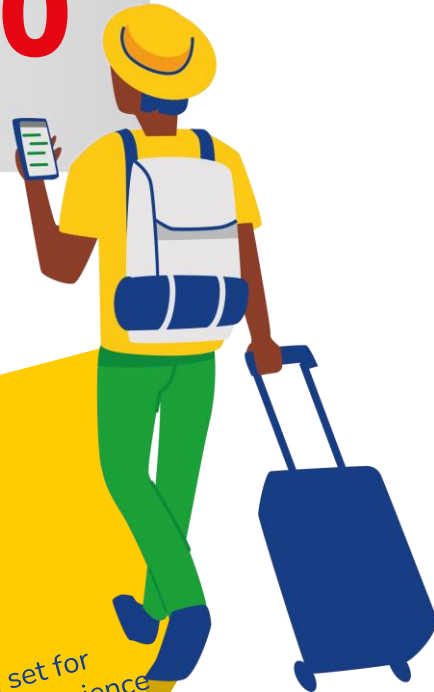
Current German long-haul market size: **6.9-million**, expected to reach **11.7-million** by 2025



Germany travel trends

South Africa arrivals
from Germany in 2019

323 000



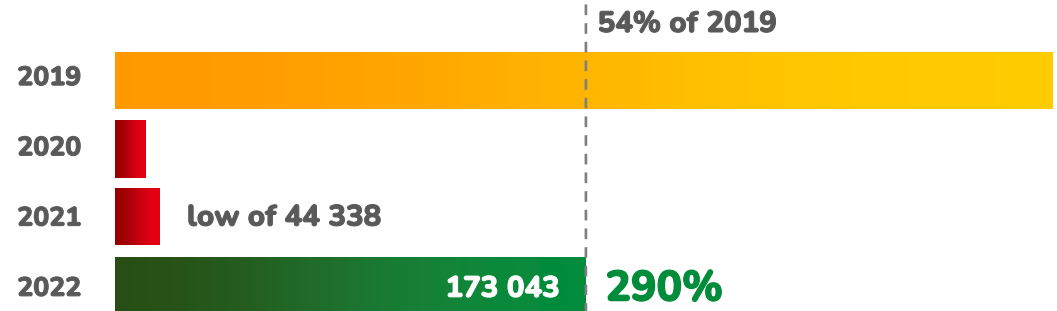
South Africa is
Germany's

#3

market in the
consideration set for
both **wildlife** experience
& beautiful **scenery**

Arrivals from Germany **dropped off sharply** in 2020,
reaching a **low of 44 338** in 2021

Arrivals from Germany **bounced back** strongly in 2022 from
2021 (**290%**), but at 173 043 were still almost **54%** of
2019 pre-pandemic levels



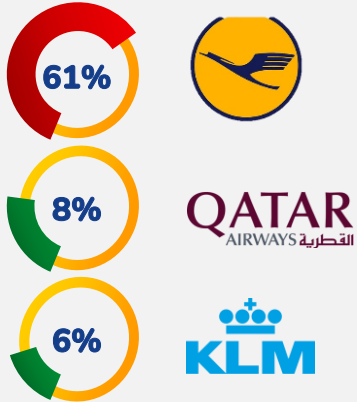
R6.1-billion
in 2025

19.1% growth

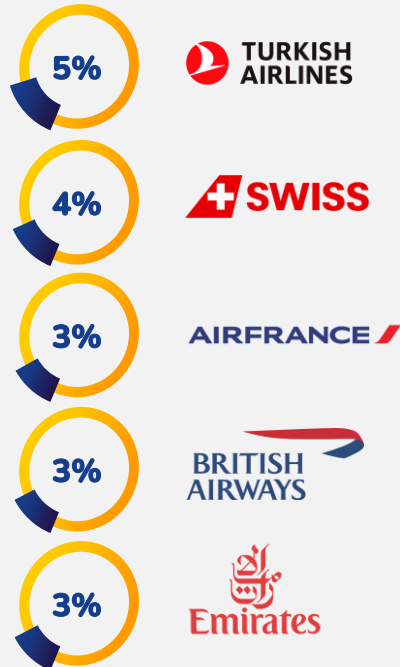
Visitor spending expected to rise from **almost 4.4-billion** in 2022 to **R6.1-billion** in 2025 (2019: R6.6-billion), a cumulative **growth rate of 19.1%**

Getting to South Africa

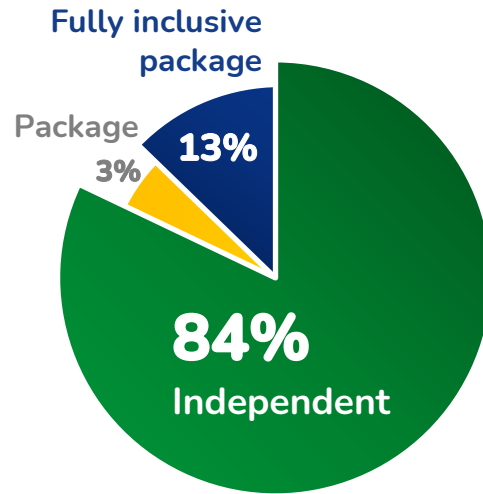
Top airlines



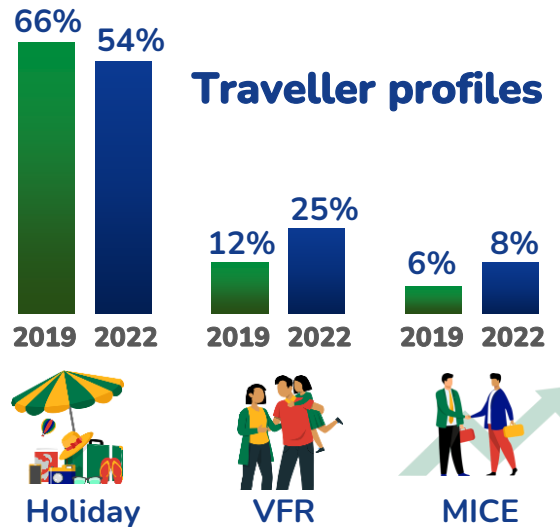
Other airlines



Travel package preferences



Traveller profiles



German travellers consider **air ticket prices** to South Africa to be a bit steep

Europe's biggest tourist exporter – with expected year-on-year growth of **9.3%**, Germany will export **127-million** global outbound travel trips by **2025**

Competition for the German market

Ahead of the recovery curve to SA

#1  Kenya

#2  Brazil

#3  The Caribbean

Kenya was projected to reach pre-pandemic levels by 2025 (South Africa = 2026)

South Africa



Positives

- Uncrowded/ remote locations
- Wildlife experience
- Beautiful scenery



Negatives

- Safety and security concerns (crime)
- Low awareness of South Africa (56%)
- Difficulty in moving around

Rest of South Africa's competitive set



USA



Thailand



China



Canada



India



Mexico



Australia

What are Germans looking for?



Beautiful scenery and wildlife



Going to the beach



Shopping and eating out



Hospitality and friendliness

6.7
million



German long-haul travellers globally

Profile of German arrivals



Nearly half of German visitors are **repeat travellers** (47% in 2022)



Most German travellers are **male** (61% in 2022)



Most German visitors travel **alone** (58% in 2022) or with a **spouse** (29%)



Millennials make up nearly half of the German market, with 48% in 2022 being 25- to 40-year-olds



In general, Germans do **one destination** per trip, and generally stay for **five days**

±R26 500

Average spend per German visitor is **R26 500** (first half of 2022),



Budget is key to travel choice, as is the **rand-euro exchange rate**



Germans are most likely to have **heard of South Africa** through **friends, family** or **colleagues**, or a **movie** or **TV show**



Germans are likely to use **search engines** to research and acquire further information on a destination



Other than **fears over safety and security** (50% of reasons to not recommend), they **do not see South Africa as a relaxing destination** (27%)



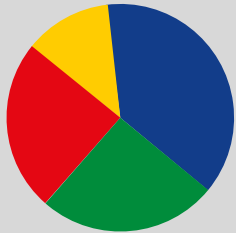
The **Western Cape** is German visitors' most popular province (61% in 2022)



Most popular attractions in the Western Cape are the **V&A Waterfront**, the **Cape Town CBD** and **Camps Bay**

Where do German travellers mostly stay?

Self-catering accommodation



Hotels and game lodges

Guesthouses

Friends and family

Activities of choice



Shopping

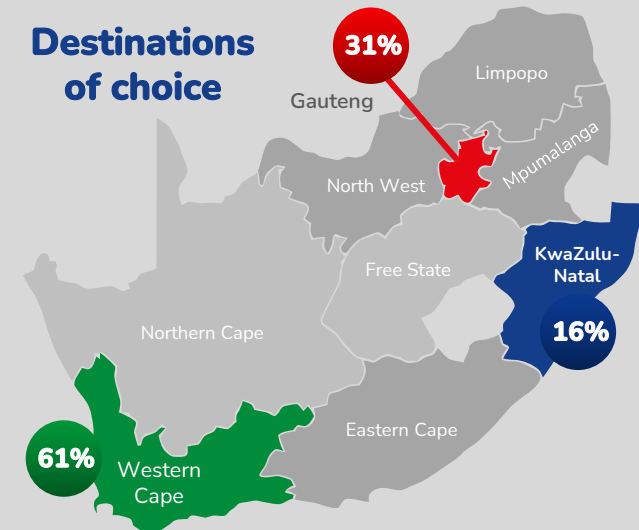


Going to the beach



Visiting natural attractions

Destinations of choice



Key insights



South Africa scores highly for **natural beauty** and **wildlife experiences**



Budget, and **exchange rates**, are a key determinant of travel choices



German visitors prefer **staying with family or friends**



Germans least associate South Africa (3rd) with safety and security, with Kenya (2nd) and India (1st) having the lowest association



German travellers tend to **book their own travel**

Opportunities that would speak to the German market



Mother Nature

- Natural beauty
- Wildlife experiences
- Beaches



The vibe

- Eating out
- Socialising



Great shopping

- World-class malls
- Wide array of choices
- Value for money



Hidden gems

- Destinations
- Shopping
- Food
- Remote locations



Local connections

- Nearly half are repeat visitors
- Many have friends and relatives in South Africa



Cultural destination

- Diverse cultures
- Experiences to explore