

# UNLOCKING THE **NIGERIA MARKET**

BY SAT INSIGHTS UNIT



SOUTH AFRICAN TOURISM



Canada

USA

Brazil

Russia

China

Japan

India

Australia

South Africa

Nigeria

Kenya

Malawi

Mozambique

Zimbabwe

Eswatini

Lesotho

Botswana

Namibia

Zambia

Netherlands

UK

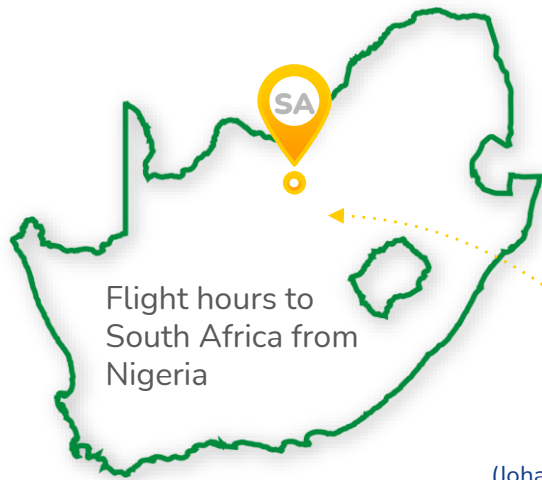
Germany

France

Spain

Italy

## Nigeria facts



Flight hours to  
South Africa from  
Nigeria

Lagos:  
6 hours  
(Johannesbur  
g direct)



CURRENCY:  
**Nigerian  
naira** (NGN)

2022 Average Annual  
Exchange rate:  
USD1=R16,4



LAND MASS  
**923 769**km<sup>2</sup>



POPULATION  
**219.6**-million (2022)

The Nigerian arrivals pattern starts a strong dip in June and then grows to December. In the pre-pandemic peak travel months were **January, April, August, and November.**



**GDP**  
per capita:  
\$2 326.20  
(2022)

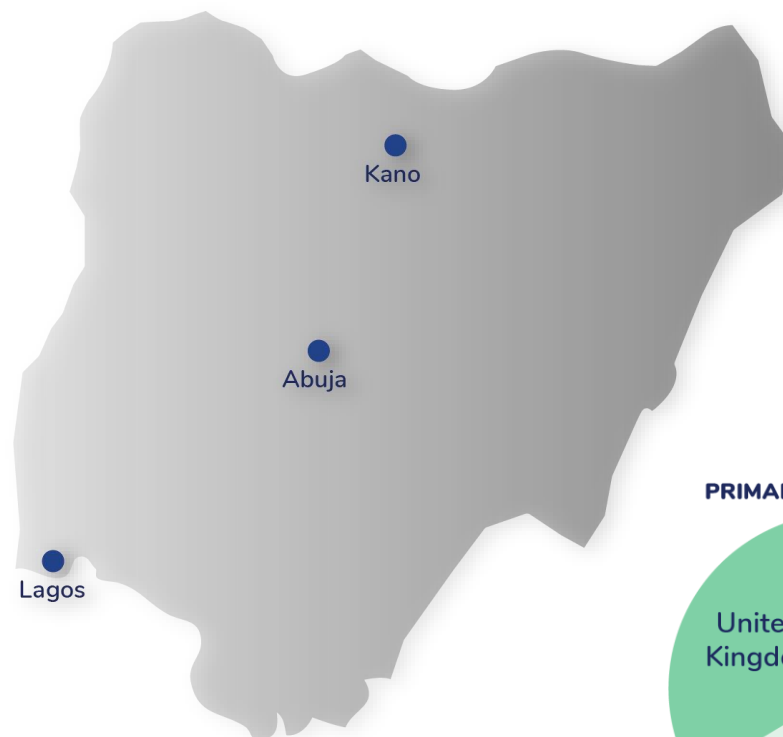
**GDP**  
growth rate:  
2.7% (2023  
projection)

## Nigeria travel status



Nigeria's outbound trips are expected to rebound back to 2019 figures by 2025 to reach over 1,2 million. **Long-haul** annual travel growth is estimated at **15.7%** and outbound travel to **sub-Saharan Africa** growing annually by **24.9%**.

Total Outbound in 2019 was **1.2 million trips**  
SA Market Share **3.2%**



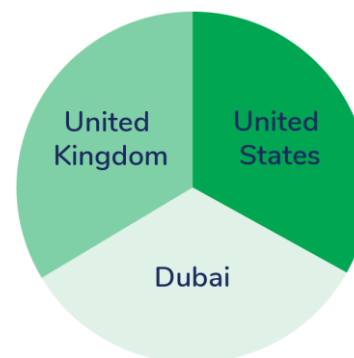
**Current Nigerian long-haul market size**

**500 000**

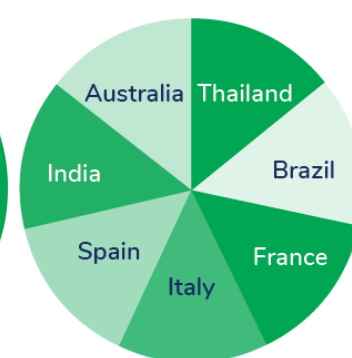
**expected to reach**

**700 000 by 2025**

### PRIMARY COMPETITORS



### SECONDARY COMPETITORS



We are now able to welcome Nigerian visitors as **borders are open for travel.**

### Entry to South Africa:



Proof of **vaccination** not required



Wearing a **mask** not required



No **capacity** limits or **social distancing** requirements

South Africa arrivals  
from Nigeria in 2019:

**39 014**



**Arrivals** in South Africa are expected to recover to **2019** levels by **2025**.



## Nigeria travel trends



A growth rate of 37,2% was experienced between 2022 and 2023

**Market size** (long haul) is estimated at 0,5 million and is anticipated to reach **0,7 million by 2025**.

## Competition for the Nigeria market



### South Africa



#### Positives:

- Value for money
- Caters to Nigerian activities of choice
- Closer to Nigeria than primary competitors



#### Negatives:

- Safety concerns

Nigerians are **more positive about South Africa** than they were in 2019 to an all-time high



The South Africa closure ratio is **1 in 1.25** – better than key competitors for this market:

- #1** South Africa is Nigeria's market ahead of the UK and US, in terms of closure ratio
- #1** South Africa is top destination for Wildlife in Nigeria

### South Africa's competitors:

#1



Dubai

#2



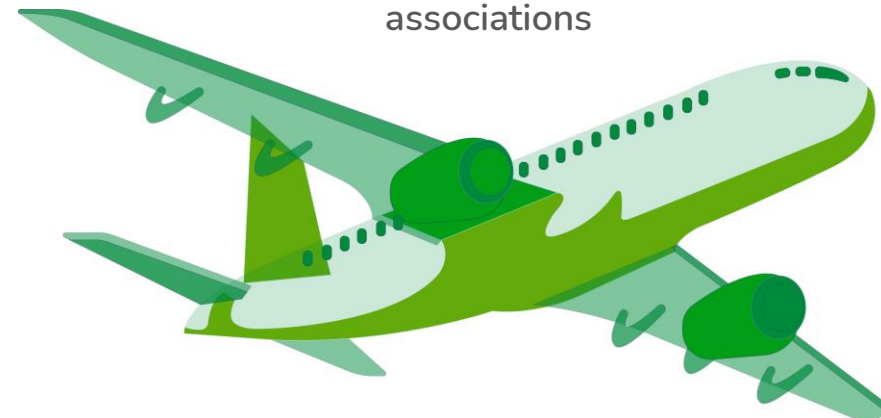
US

#3



UK

Despite South Africa's leadership on closure and wildlife. Dubai, UK, and USA lead South Africa on brand attributes and performance associations



**0.5**  
million



## Nigerian long-haul travellers



Gauteng is the #1 destination, followed by the Western Cape.



Mostly travel **alone** (87% in 2022).



Overwhelmingly **male** (72% in 2022).



More likely to be **repeat travellers** than first-time visitors.

> 21  
< 50

The **21 to 30**, **31 to 40** and **41 to 50** age brackets (21% each).

## Profile of South African arrivals



Reasons for visiting: **VFR** and **business**, as well as **holidays**.

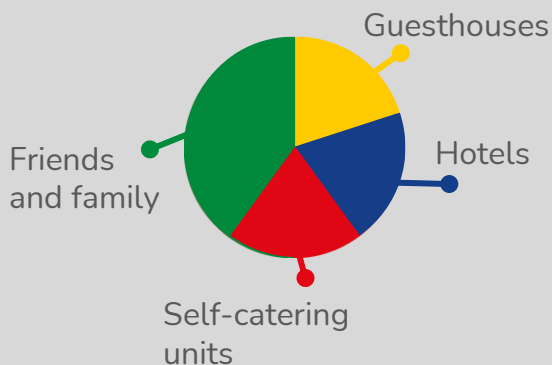


Length of stay in 2022 was **16 days**, down from 27 in 2021.

± **R23 200**

On average they spend **R23 200 per tourist** in 2022

## Where do Nigerians travellers mostly stay?



Source: SAT Departure Survey

## Nigerians' preferred activities



Eating out



Shopping (Sandton City, Eastgate Mall and the V&A Waterfront)



Socialising

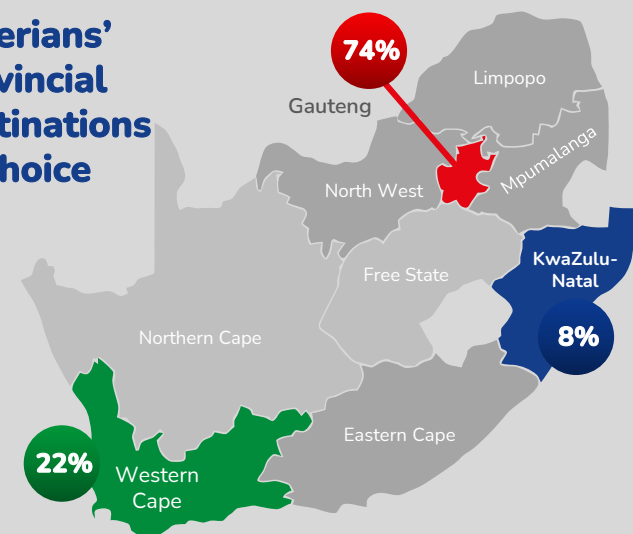


Beaches



Business

## Nigerians' provincial destinations of choice



# What do Nigerians think of South Africa?



## Bang for buck

Nigerians consider South Africa to be a top value-for-money destination.



## Culture vultures

Nigerians rate South Africa as offering world-class cultural experiences (but that's not primarily why they visit).



## Elbow room

South Africa is a destination where getaways are less crowded.



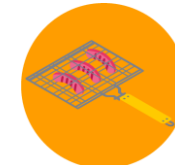
## Wellness paradise

South Africa has many wellness attractions, such as yoga retreats, spas, etc.



## Creatures feature

While most Nigerian visitors prefer shopping and nightlife to wildlife, they recognise South Africa for its wildlife experiences.



## Keeping it real

South Africa is seen as an authentic travel destination.



## Good people

Nigerians regard South Africans as warm and welcoming.



## Medical support

Nigerians believe that South Africa has a good medical infrastructure in the event of an emergency.

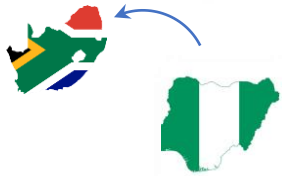


## Mobility matters

It's easy for Nigerian visitors to get around in South Africa.



## Key points



**Proximity advantage:** South Africa is **closer to Nigeria** than any primary competitor.



Nigerians believe they get **value for money** when they visit South Africa.



The **Nigerian community** in South Africa is a **primary driver** of arrivals. As VFR has been a key driver of recovery



Nigerian visitors prefer **staying with family or friends**.

## Opportunities that would speak to the Nigerian market



### Shopping mecca

- World-class malls
- A plethora of retail choices
- Leading local and international brands



### Foodie culture

- Fine dining to street eats
- Excellent quality
- Diverse South African cuisine to explore



### Infrastructure

- Ease of movement
- Good healthcare



### Hidden gems

- Destinations
- Shopping
- Food
- Cultural experiences
- Wellness options



### Local connections

- Most have already visited South Africa
- Friends and family abound
- Thriving business activity