



UNLOCKING THE SPAIN MARKET

BY SAT INSIGHTS UNIT



SOUTH AFRICAN TOURISM



Canada

USA

Brazil

Netherlands

UK

France

Spain

Germany

Italy

Russia

China

Japan

India

Nigeria

Kenya

Zambia

Malawi

Mozambique

Botswana

Zimbabwe

Namibia

Eswatini

Lesotho

South Africa

Australia

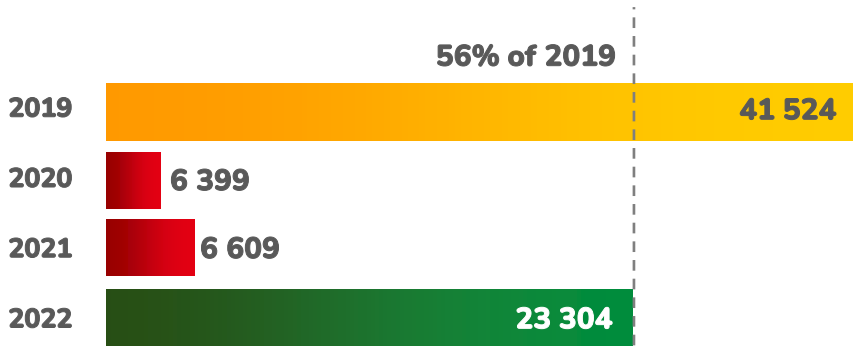
Spain facts

POPULATION (2023)

47.22-million



The only European country with a physical border with an African country.



The Marcha Real, Spain's national anthem is said to be one of the world's oldest national anthems

LAND MASS
505 988km²

per capita GDP
\$30 104
(2021)



CURRENCY + EXCHANGE RATE
Euro €
Exchange rate:
R17,21 to €1 (2023)

Overwhelmingly the peak travel month for Spain's arrivals to South Africa is **August**. This was consistent pre-pandemic and 2022 has reverted to the same pattern with August almost double the travel of the other months. Arrivals climb from **April to June** and are highest from **July to October**.

Getting to South Africa

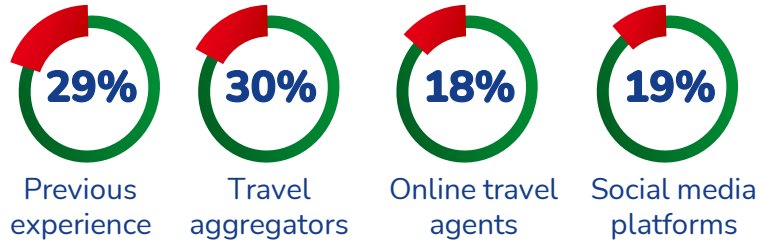
Travel preferences

- Most (72%) prefer independent travel (not package holidays)
- Prefer to book directly with the airline, or through a travel agent
- Prefer to book accommodation directly, sometimes using an agent

No direct flights from Spain to South Africa

Flight hours to South Africa from Spain:
from **±14 hours (indirect, including one stop)**

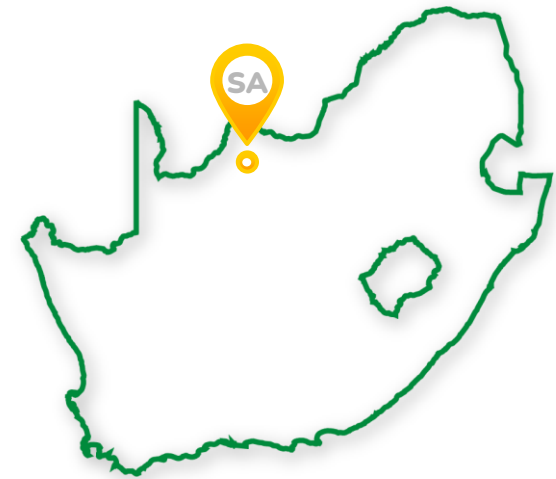
Information sourcing (2022)



Travel package preferences (2022)



Popular Airlines:



Spain Travel status

South Africa arrivals from Spain in 2022

23 304




exceeded annual target of 14 543 by 60.2%

This can be attributed to “revenge travel” (travellers making up for trips postponed in 2020)



The number of Spanish visitors to South Africa is expected to reach 35 466 by 2025, growing by 15% year-on-year from 2022 (2019 pre-Covid-19 figure: 41 524)

Purpose of visit (2022)

-  Holiday travel
-  Business travel
-  MICE

#3

FOR WILDLIFE EXPERIENCES



Spanish tourists to South Africa spent about **R493-million** in 2022 (exceeded target by 75.3%)



2025 target spend: **R686-million** (may be reached earlier)



Spanish travellers generally book **four to 11 months** in advance



Awareness of South Africa as destination: **75%**



South Africa is Spain's **#3** market for **wildlife** experiences



Spanish traveller profile

The typical Spanish visitor to South Africa:



Travels alone, or with a spouse/partner



Is a first-time visitor **(62%)**



On holiday, Visiting Friends/Relatives or travelling for **Business Events**

What do Spaniards think of South Africa?



Scenic beauty: Spaniards rate South Africa highly for natural beauty and wildlife



Hospitality: Spanish visitors value the friendliness of South Africans



Security: 1 in 5 pointed out safety and security as a bad experience

Insights



The overwhelming **majority of Spanish** visitors say they would **visit South Africa again**



SA is not highly associated with being a value for **money destination**



Spanish visitors prefer to stay in **hotels, game Lodge and self-catering facilities** (In 2022 more people stayed in friends & Family)



They tend to buy their travel **products unbundled**, a fewer degree will buy a **full package**

6.7
million



Spanish long-haul travellers globally



The **Western Cape** is Spanish visitors' most visited province in South Africa



Nearly two-thirds are **first-time travellers** to South Africa (**62%**)



The typical Spanish visitor is between **25 and 44 years of age**



Male visitors outnumber female visitors (64%)



Mostly **solo** travellers, or travel with a **spouse or partner**



Prefer to use **online travel aggregators**, travel blogs and social media for research. Also draw on information from friends and relatives, travel agents, and past experience



Prefer to stay in **hotels self**



Spanish travellers spent an average of **R23 500 per trip** in 2022, mainly on food, accommodation and leisure (an increase of 12% from 2021)



Spanish visitors **do not find it easy to interact with locals** in South Africa (this could be because of the language barrier)



Visitors from Spain are **put off by poverty and beggars** in South Africa



How long do Spanish travellers stay?

Overall, Spaniards spend an average of 20 nights in 2022 up from 14 nights in 2019. They spend 7 nights on average at a hotels, and an average of 6 nights at a Game Lodge

Activities of choice



Eating out



Shopping



Natural attractions



Wildlife

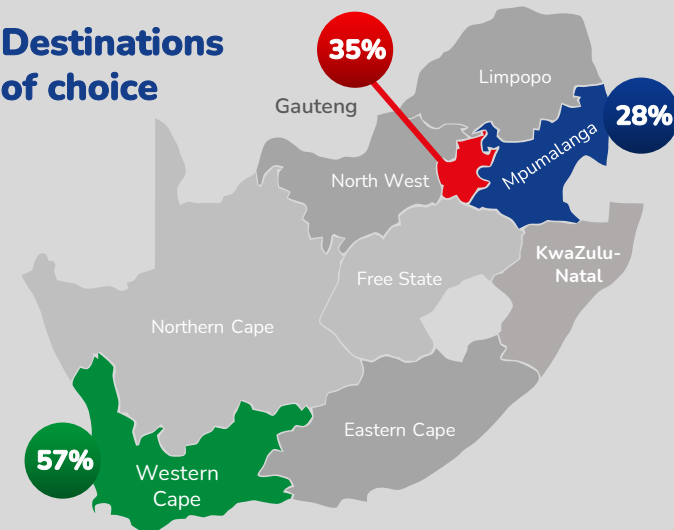


Socialising



Beach

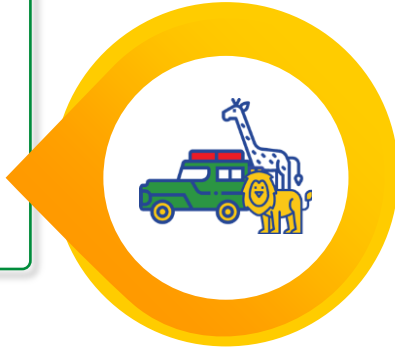
Destinations of choice



Competition for the Spanish market

South Africa's main competitors for the wildlife tourism market:

- #1  Kenya
- #2  Brazil
- #3  Australia



Ahead of the recovery curve to SA

- #1  India
- #2  The Caribbean
- #3  Brazil

South Africa is expected to see **slower growth** from the Spanish market when compared to India and Kenya

What are Spanish visitors looking for?



Wildlife experiences



To experience a different country



Natural scenery



To experience South Africa's different cultures



A diversity of attractions