



UNLOCKING THE UK MARKET

BY SAT INSIGHTS UNIT



SOUTH AFRICAN TOURISM



Canada

USA

Brazil

UK

Netherlands

Germany

France

Spain

Italy

Russia

China

Japan

India

Nigeria

Kenya

Zambia

Malawi

Mozambique

Botswana

Namibia

Zimbabwe

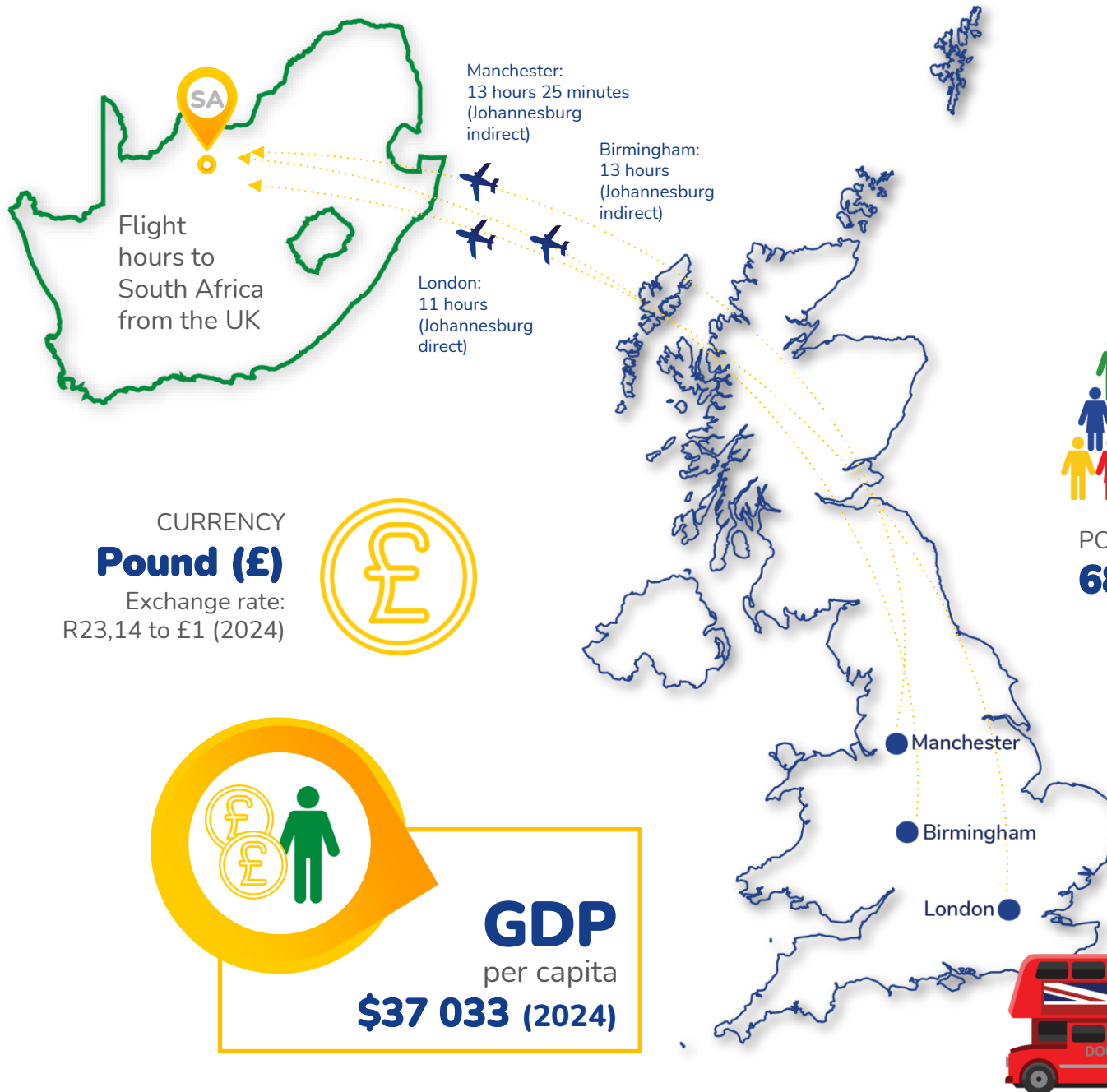
Eswatini

Lesotho

South Africa

Australia

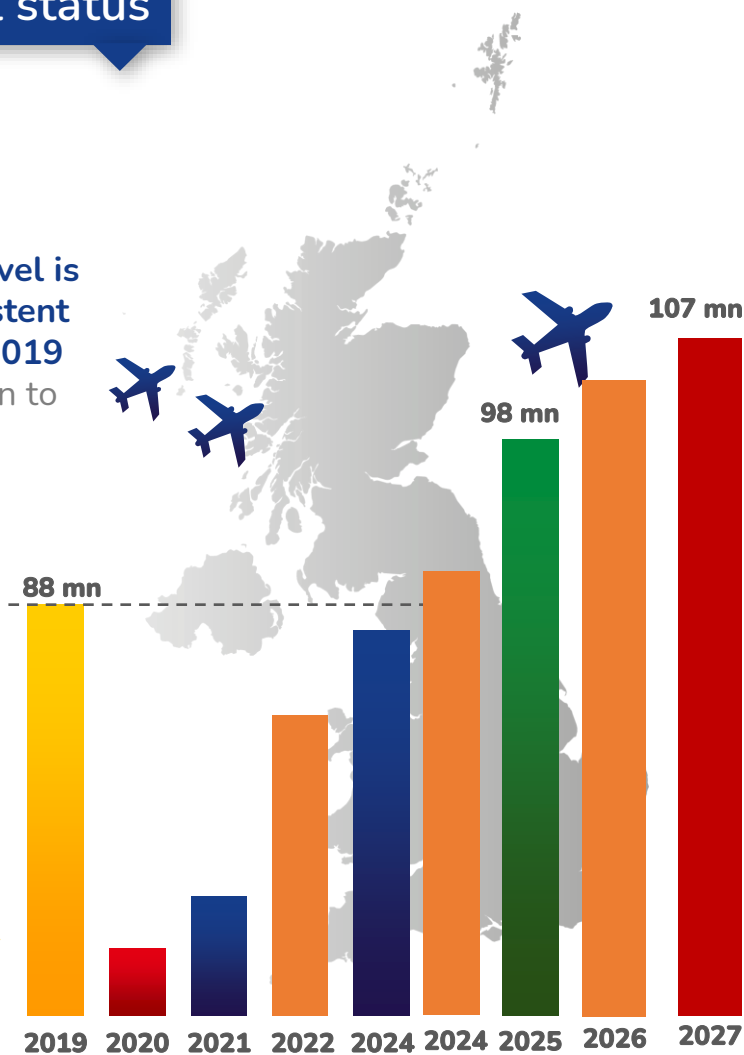
United Kingdom facts



British travel status



With UK's **total outbound travel** is has continued to show consistent growth, having superseded 2019 figures in 2024, UK is foreseen to reach 107 million in outbound travel



Current British (long-haul) market size 2024:

20,8 million is expected to reach 25,3 million by 2026

UK Total Outbound

5th biggest tourist exporter globally

Competitors who will see fastest recovery growth from this market:



China



Mexico



Australia

South Africa's other competitors:



USA



Thailand



Kenya



India



New Zealand



Brazil

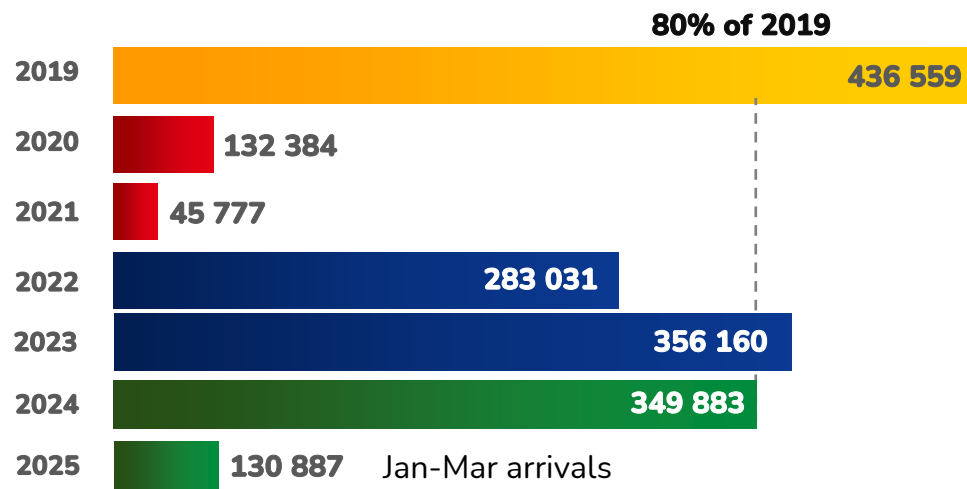


Visitor spending in South Africa at R24 600 (2020) is 19.2% higher than the international average of R20 300. In 2023 UK visitors spent an R27 700 in South Africa. This has gone down by -4,3% reaching R26 500 in 2024

United Kingdom-South Africa travel trends

UK arrivals dropped significantly in 2020, hitting a low of 45,777 in 2021. A strong rebound followed in 2022 with a 518% increase, and substantial growth continued into 2023. However, 2024 saw a slight decline, with arrivals decreasing from 356,160 to 349,883.

In terms of spend, UK visitors contributed R9.4 billion to South Africa's economy in 2023, but this fell by 6.0% in 2024, totaling R8.9 billion.

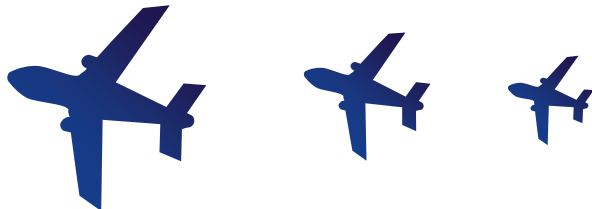


South Africa is the UK's **#2 market** for **wildlife experiences**



South Africa is the UK's **#3 market** on **break taking destination**

Getting to South Africa



Seat Capacity

Past 12 months (January 2024 to December 2024)



Available airline seats

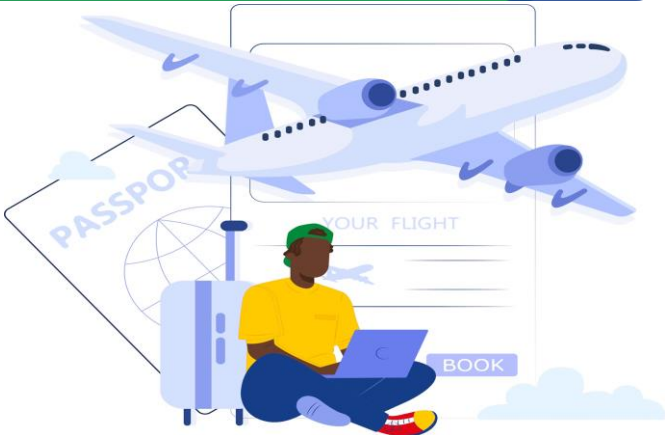
Over next 12 months (January 2025 to December 2025)

Average fares:

Virgin Atlantic	British Airways
R14 516	R26 074



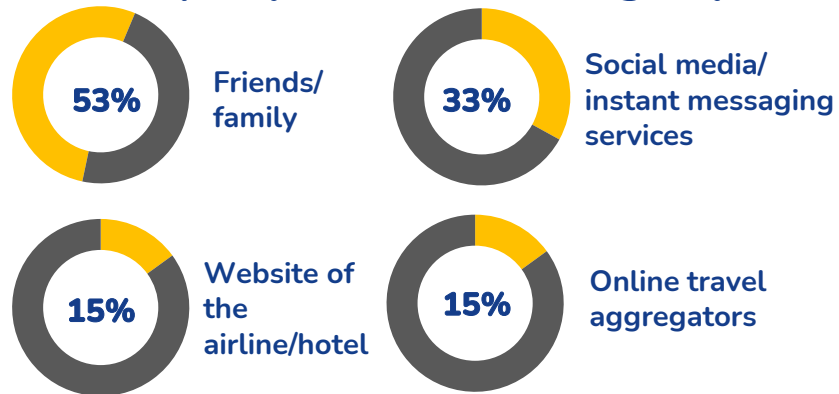
Top indirect airlines:



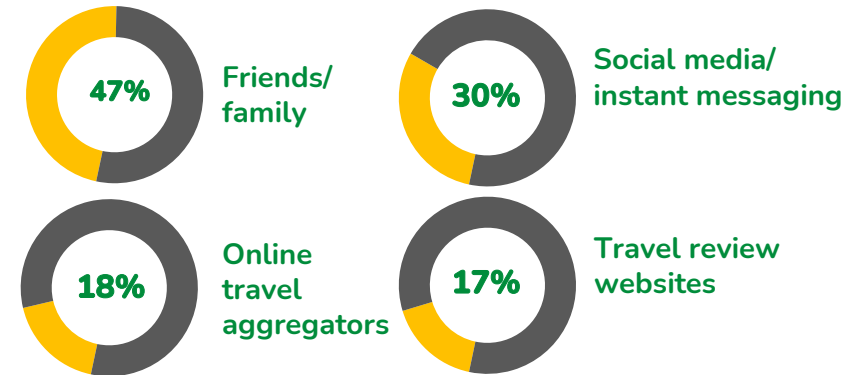
When sharing their holiday experiences, Britons' preferred channels are friends/family or Social media/ instant messaging services

Role of Media Channels

Channels used to share details of holiday experiences during trips



Channels used to share holiday experiences after trips



Profile of the UK traveller to South Africa

British traveller facts:



Three in five of British visitors are **repeat travellers** (63% in 2024)



Millennials make up about 35% of British visitors to SA, and GenX were 36% of UK visitors to SA in 2024



Budget is a key determinant of travel choice – Britons prize value for money



Just more than half of British travellers are **male** (57% in 2024)



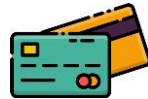
Most popular attractions in the Western Cape are **the V&A Waterfront, the Cape Town Central City, Cape Point** and the **Cape Winelands**



Britons preferred media channels include Online news, articles, web pages, blogs, travel booking / review websites,; Video streaming; Social Network websites



Most British visitors travel **alone (51% in 2024)** or with a spouse/partner (33%)



Average spend per British visitor is **R26 500** (2024), with a focus on accommodation (R12 700), shopping (R8 400) and food (R8 100)



Britons like destinations that offer **adventure and experiences**, and where they can engage with **locals**

Activities of choice



Eating out

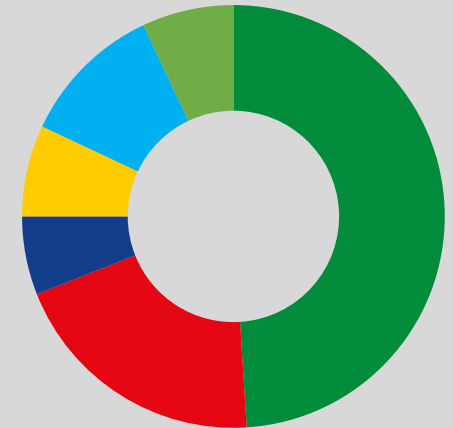


Shopping



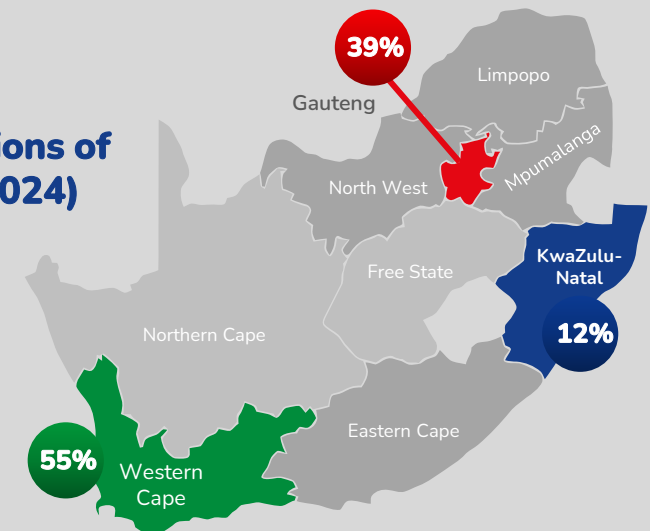
Visiting Natural Attractions

Three top places to stay



■ Family and friends ■ Hotel
■ Game Lodge ■ Self Catering
■ Other ■ Guesthouses

Destinations of choice (2024)



What do Britons think of South Africa?



Excellent value:
Britons consider South Africa to be a top value-for-money destination



South Africa is not known for offering wellness retreat like Thailand & India



They value word of **mouth** referrals



Britons say that **South Africa is breath-taking**



Cultural attractions:
Britons like to immerse themselves in cultural activities



Refer to multiple **info sources** for planning their travel

Key insights



South Africa scores highly for natural beauty and wildlife experiences



Budget is key when it comes to travel choices



Average length of stay is about two weeks (14 nights)



British travellers tend to book their own travel

Opportunities that would speak to the British 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



Cultural destination

- Diverse cultures
- Experiences to explore
- People to meet



Local connections

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

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