

Getting to know the USA

- **Currency** : US dollar. Annual average rate 2026: \$1 = R17.88
- **Population**: 349-million
- **GDP per capita**: \$98 990
- **Outbound travel market size**: 150,8-million (2026)

Outbound performance

- **Arrivals**: 391 939 (2025) fully recovered 104% beyond 2019
- In 2025, the USA became the **top overseas spend market**
- The US is the second biggest overseas market on arrivals behind the UK



Getting to South Africa

- **Washington**: 16 hours (Cape Town, direct)
- **New York**: 16 hours (Cape Town, direct); 14 hours (Johannesburg, direct)
- **Atlanta**: 16 hours (Johannesburg, direct); 16 hours (Cape Town, direct)



Available airline seats

- Total: 314 157
- Atlanta: 142 481
- New York: 132 098
- Washington: 39 578



Arrivals

373 694 71 959 82 020 262 183 353 975 372 362 391 939



Direct Airlines

UNITED DELTA

Top in-direct Airlines

BRITISH AIRWAYS KLM American Airlines QATAR AIRWAYS



Competition for the USA market

- Most American travel is to other regions which creates a great potential market for South Africa

Fastest-growing long-haul destinations

- Brazil
- Italy
- Greece
- Australia
- India
- Singapore
- The Philippines
- Indonesia

Spending

- **Average spend/visitor**: R32 200 in 2025 contracted slightly. The total spend increase was driven more by the increase in arrivals
- **Total spend**: R11.8-billion in 2025. The USA is the top spend country among the overseas markets.



Brand summary for America (SAT Brand Tracker)

Australia is the lead competitor



Even on brand associations that are perceived as South African strengths, such as being breathtaking and exciting

South Africa scores competitively



...offering wildlife experiences, the opportunity to experience natural attractions and less-crowded and remote locations

Barriers for The American market

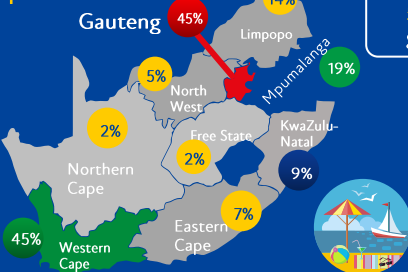


...include negative perceptions of crime, general safety and political uncertainty

Key consumer insights

- **Cultural Connoisseurs segment**: are empty nesters, experienced travellers who are looking for exploration, natural scenery, history and culture
- **Experiential Trailblazers segment**: are young childless professionals who are time-starved and travel for fun, adventure, history and culture
- **Modern Memory Makers segment**: are young couples with young children who travel for family time, variety of experiences, history and culture, as well as the beach
- **ALL SEGMENTS**: Travel is about seeking to understand the history and culture of a destination. The natural beauty, cuisine, relaxing experiences and authenticity. They are looking for the unique experience and are willing to immerse more deeply in one place to unearth the unknown.
- Only Kenya features moderately as a competitor on the African continent

Preferred provinces



Americans who travel to South Africa

- 51% travel alone; 26% with a spouse/partner
- Consider themselves independent travellers
- 62% of bookings are made within three months of travel
- Self (54%) bookings for accommodation and (49%) for air tickets
- Top information sources:
 - 50% prior knowledge
 - 20% business associates
 - 30% online aggregators and OTAs
- Average stay: 16 nights
- 40% - friends and family, 24% - hotels 14% - game lodges lead in terms of paid accommodation
- 54% first-time visitors, but repeat visitors are the drivers of growth



What do they like to do?

