



UNLOCKING THE USA MARKET

BY SAT INSIGHTS UNIT
(Based on 2025 Data & Insights)



SOUTH AFRICAN TOURISM



Canada

USA

Brazil

Netherlands

UK

Germany

France

Italy

Spain

Nigeria

Kenya

Zambia

Malawi

Mozambique

Botswana

Zimbabwe

Namibia

Eswatini

Lesotho

South Africa

Russia

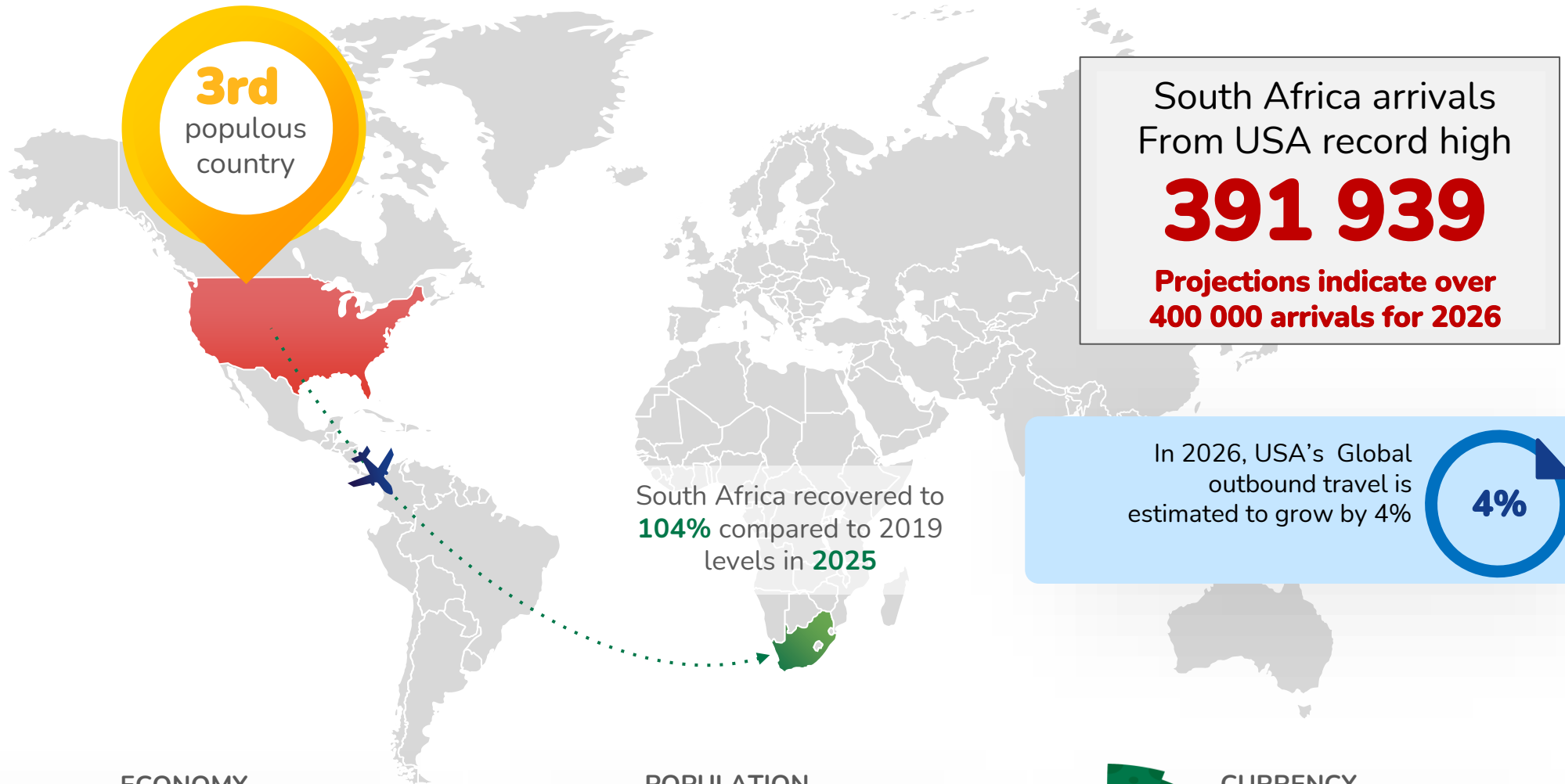
China

Japan

India

Australia

USA travel trends



ECONOMY



USD 89,990
per capita
GDP 2025

POPULATION



349.0-million

Outbound travel market size:
150.8-million (2026)

CURRENCY



US Dollar

Annual average rate 2025
Exchange rate:
R17.88 to \$1

USA travel status



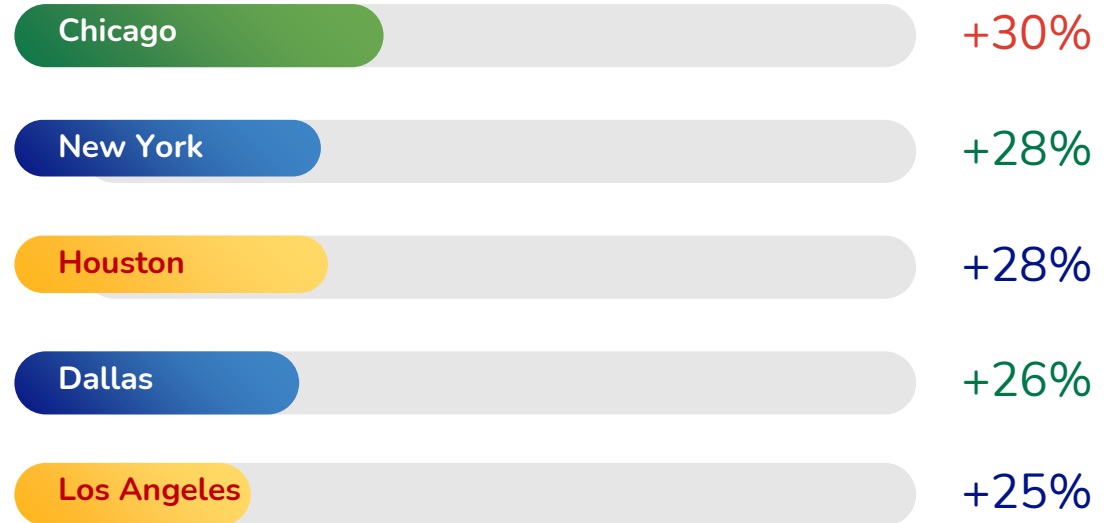
i The spend contracted from R32,900 in 2024 to **R32,200 for 2025**

The total spend on the other hand went from R11.5 billion, and rose to **R11.8 billion**, which is the top spend country among the overseas markets, second only to Zimbabwe

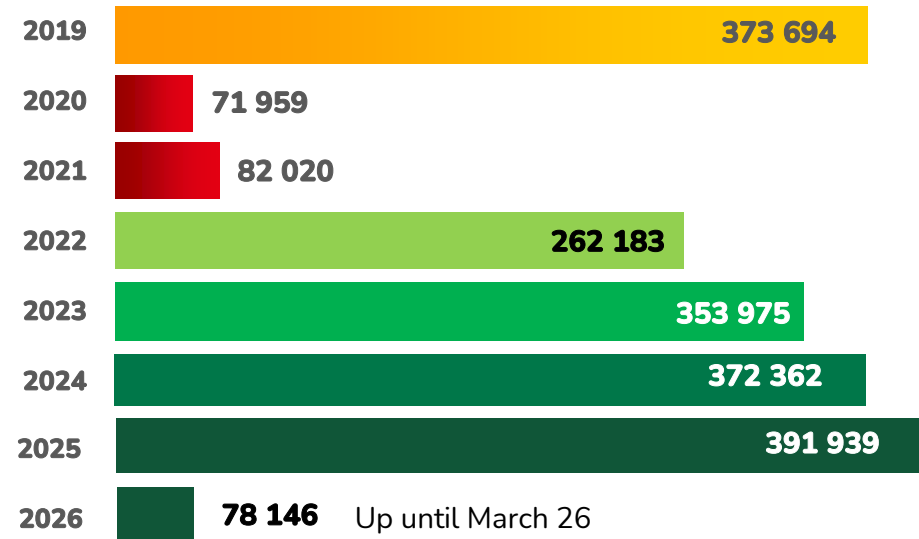


Top 5 (2020 – 2025)

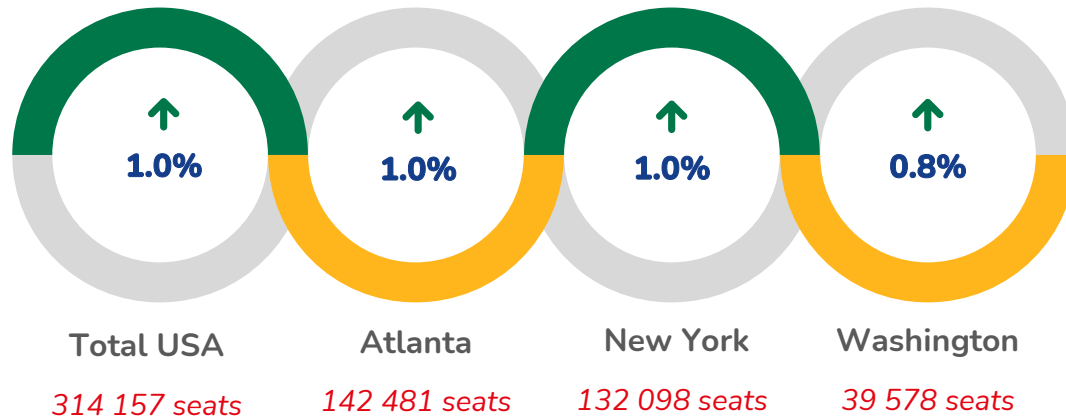
source cities for outbound travel:



SA Arrivals



Getting to South Africa



Airlines were a major contributor to the growth in arrivals and bookings, leading to the recovery of the market in 2025



The seat capacity has continued to grow in 2026 after being fully recovered in 2025

Direct Flights to South Africa

Average Fares by Airlines:



New York + Washington



Atlanta

	New York	Washington	Atlanta
Johannesburg	R14 097	R12 988	R12 808
Cape Town	R15 158	R16 120	R13 216




Routes are needed the most from **Los Angeles, Chicago, Dallas, and Houston** as these are 4 of the top 5 outbound source cities behind New York where United Airlines has direct flights

Competition for the US market




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

Brand Tracker performance overall summary for America

Australia  is the lead competitor

Even on brand associations that are often perceived as South African strengths such as being breath-taking and exciting.

South Africa  has record high positivity

...South Africa has seen a boost in Positivity in the US market and remains among the leaders on **Wildlife**, but other metrics have fallen

Barriers for  the American market

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

American consumer profile

All segments: Travel inspiration is driven by downloadable paid platforms, complemented by social networking websites for discovery and influence; subscription music services enable passive engagement, while TV channels provide mass reach and destination familiarity.

All segments: Travelers seek fun, new experiences and value opportunities to experience diverse cultures and traditions across destinations

They are deep planners who check review platforms, search engines like Google and AI platforms like ChatGPT.

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.



Cultural Connoisseurs



Ages: 41-65 years

Life stage: Empty nesters

Occupation: Retired or Employed in senior positions

Worldly travelers who have explored a variety of destinations

Travel needs:

Natural scenery, exploration, culture/history, food, memorable experiences and fun

Perceptions of SA:

Wildlife and Safari, with a rich cultural diversity and history. Exceptional natural scenery associated with Mandela

Experiential Trailblazers



Ages: 25-40 years

Life stage: Young professionals

Occupation: Employed or Studying

Time-starved worldly travelers explored a variety of destinations

Travel needs:

Exploration, fun, culture/history, adventure, natural scenery, relaxation and food

Perceptions of SA:

Wildlife safari, nature reserves and a rich cultural diversity and history.

Modern Memory Makers



Ages: 25-40 years

Life stage: Young families

Occupation: Employed or Studying

Time-starved emerging travelers explored some parts of the world except Africa and certain parts of Asia

Travel needs:

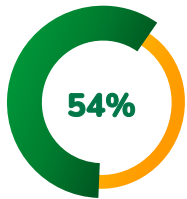
Variety, fun, family time, exploration, culture/history, memorable experience and beach

Perceptions of SA:

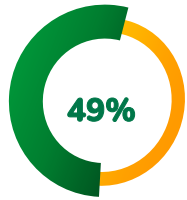
Rich cultural diversity and history with wildlife and natural scenery

American consumer profile

Self-bookings



Accommodation



Flights



American travellers



62% bookings are made within 3 months of travel, and 34% within one month of travel



The top sources of information for US tourists are prior knowledge (32%), OTA's (22%), and online aggregators (19%)



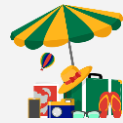
Most of the bookings are made directly for accommodation and air tickets – 55% consider themselves independent travellers



Most of the arrivals are holiday tourists, 54% in 2025, and 76% are leisure tourists (Holiday + VFR)



The average tourist spends 16 nights in 2025, up from 15 nights in 2024



Despite the first-timers being the majority (54%) of US tourists, repeaters have been the drivers of growth



American tourists travel alone (51%) or with a spouse (26%)



Two-thirds (67%) of arrivals are over 35 years old, and 40% are between 35 and 50 years old



They spend an average of R32 200, while there was an increase in total spend driven by food, leisure, and shopping



Both the total Bednights and total spend grew in 2025, up 7% and 3% respectively



40% of US bednights are spent staying with friends and family, while hotels (24%) and game lodges (14%) lead in terms of paid accommodation

Prefer the following activities:



Eating out



Shopping



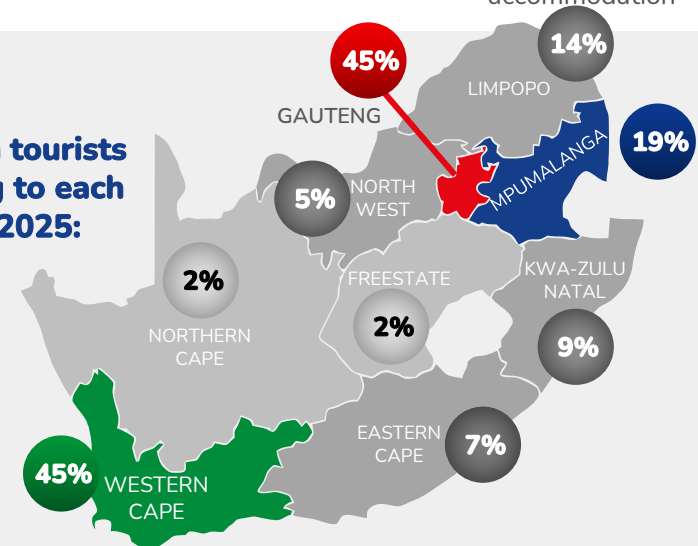
Visiting natural attractions



Wildlife

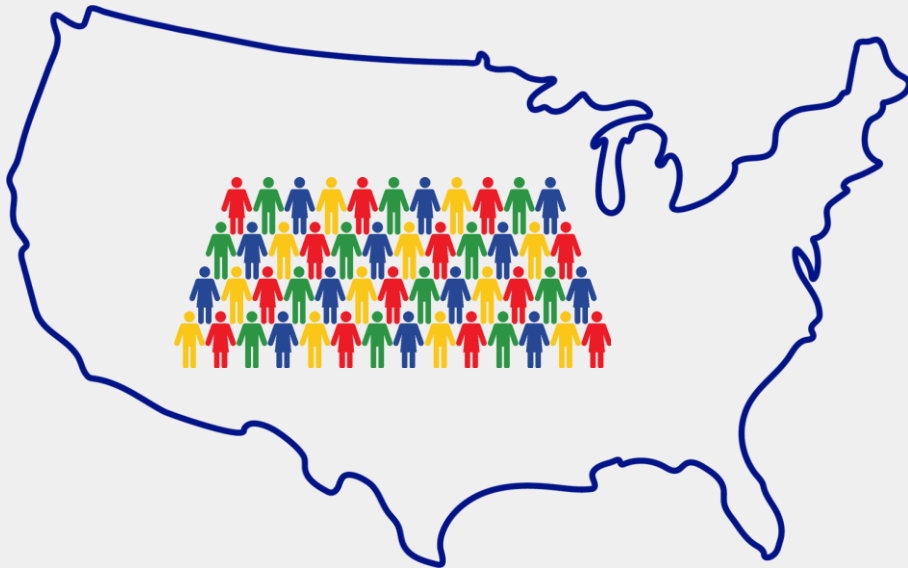
i The average spend per day has remained stable, with R2 000 spent per day, and this is down slightly from R2 100 in 2024

American tourists travelling to each province 2025:



*Travel aggregators

Key insights



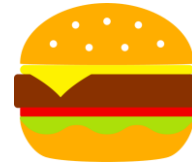
America has a **large middle-class population** who can afford travel.



Awareness of South Africa and its offerings is quite low in this market.



Recent figures show encouraging **signs of growth** from the US market, growth trends need to be encouraged as there is still potential for more growth.



The **strength of the American dollar** makes South Africa an affordable option.



Given the size of their country, Americans are used to **traveling long distances** between experiences therefore the size of South Africa and distances between attractions is not necessarily a deterrent. In 2024, there were tourists who visited all 9 provinces.



SA needs to aggressively gain share by increasing aviation routes to lower the cost of travel and provide depth of destination highlights.



Only **Kenya** features moderately as a competitor on the African continent.

Opportunities that would speak to the American market

While awareness may be low, there is an opportunity to introduce South Africa as an almost undiscovered gem, worthy of moving up in the consumer consideration. This delivers on the desire for experiences that are 'Off the beaten' and the **'Road well-traveled'**



Americans have a desire to have experiences based in the **now**.



South Africa needs to position itself as a **memorable destination** delivering on the promise of unique experiences (immersive, people-focused, walking tours, and unique adventures within urban and rural environments.)



SA Foodie culture – They are looking for a high calibre, new/novel flavour experience for Americans, from street food to top end, world class experiences.



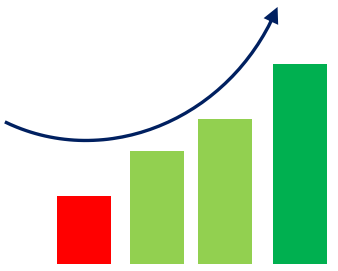
Greater connectivity needs to be explored to boost convenience for tourists and maintain leadership in wildlife and safari ahead of other competitors on the continent.



A new look at **'culture' and 'heritage'**, focusing on more recent history and lifestyle that appeals most to Americans.



Targeting the American traveller



Before the pandemic American tourists 39% **planned their trips and made bookings between 4 – 12 months**. In 2025 this has begun to normalise with **38%** of tourists booking between 4 and 12 months in advance



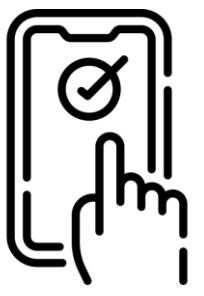
American tourists are independent travellers and seek information primarily online (**Online Aggregator & Online Travel Agents**) and from **knowledge from previous visits**



Social media and Online Travel Aggregators are the top two sources of information pre-pandemic along with **friend networks in the US**



The majority of tourists do their searching online, and most accommodation is booked either **directly on the Accommodation website** or through **OTAs**, while this is more pronounced for air ticket bookings **directly with Airlines** online



Online news sites, blogs, and travel review sites are the preferred media channel, this is followed by **Social Media, Travel Brochures, and Online Streaming Sites**



Social Media, Online news sites, blogs and Print Media (**Newspapers, Magazines, and Travel Magazines**) are the top media for targeting Americas not aware of South Africa as a travel destination



Long-haul tourists in America become aware of leisure destinations through **Recommendations by friends or family**. In addition, **Print media and seeing locations on Movie / TV shows** are hugely influential



Despite South Africa being an emerging economy, when American tourists seek a destination South Africa competes with **Europe** and other developed markets such as **Australia** and **New Zealand**



SOUTH AFRICAN TOURISM

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