



SOUTH AFRICAN TOURISM

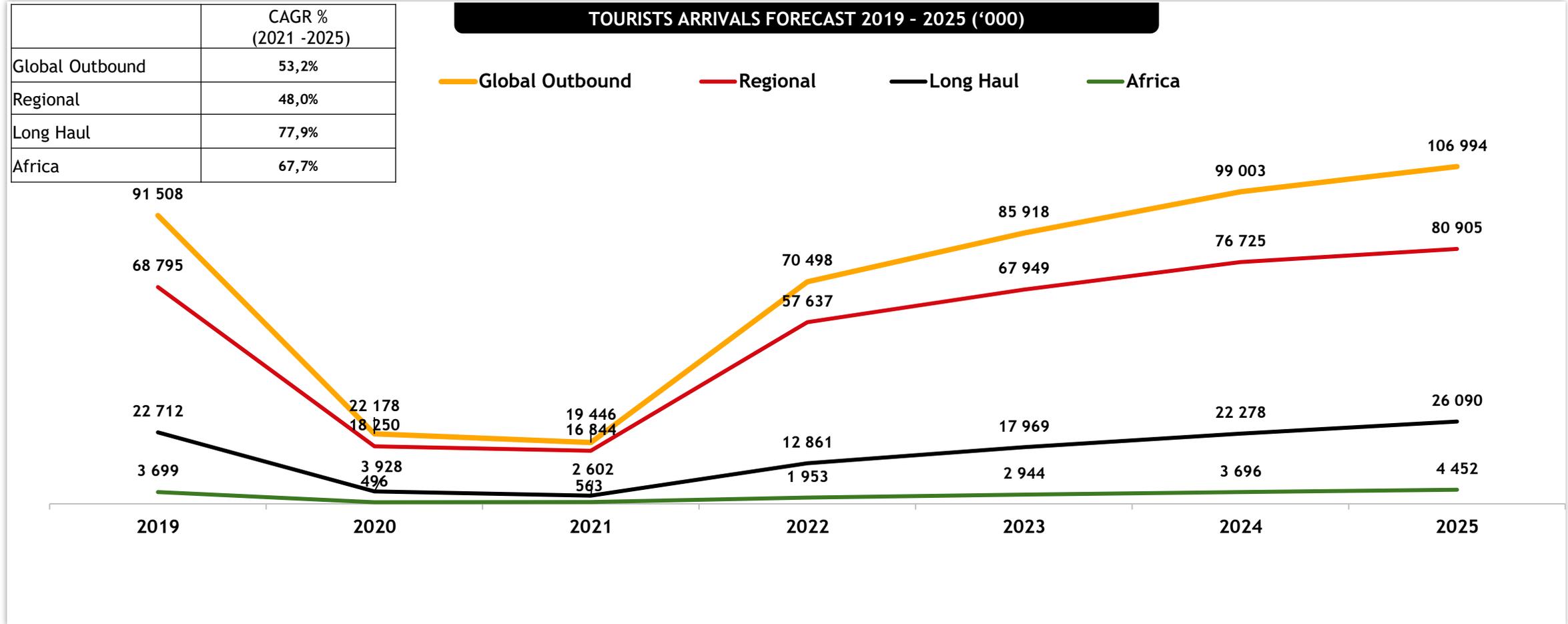


UK COUNTRY REPORT

SEP 2022

UK: OUTBOUND TRAVEL FORECAST (2019 -2025)

5th biggest tourist exporter globally - UK exported 91 Million outbound tourist globally in 2019, with an expected growth of 53,2% in the next 5 years, UK will export 107 million outbound travel trips by 2025, slightly lower than the pre-pandemic forecast of 115 million, while Africa is foreseen to see cumulative growth of 67,7% between 2021 and 2025



Source: Oxford Economics (Current upto 14 Sep 2022 | Last forecast update 30 June 2022)

UK: PERFORMANCE OVER TIME (2009 -2021) & FORECAST (2019 -2025)

The pandemic reversed over a decade’s work on UK arrivals, In 2019 UK achieved 436 559 arrivals, however, showing flat growth over the 10 years (20109 -2019). Arrivals from the UK have since declined by -69,7% in 2020, and further decline is noticeable in 2021 (-65,4%)

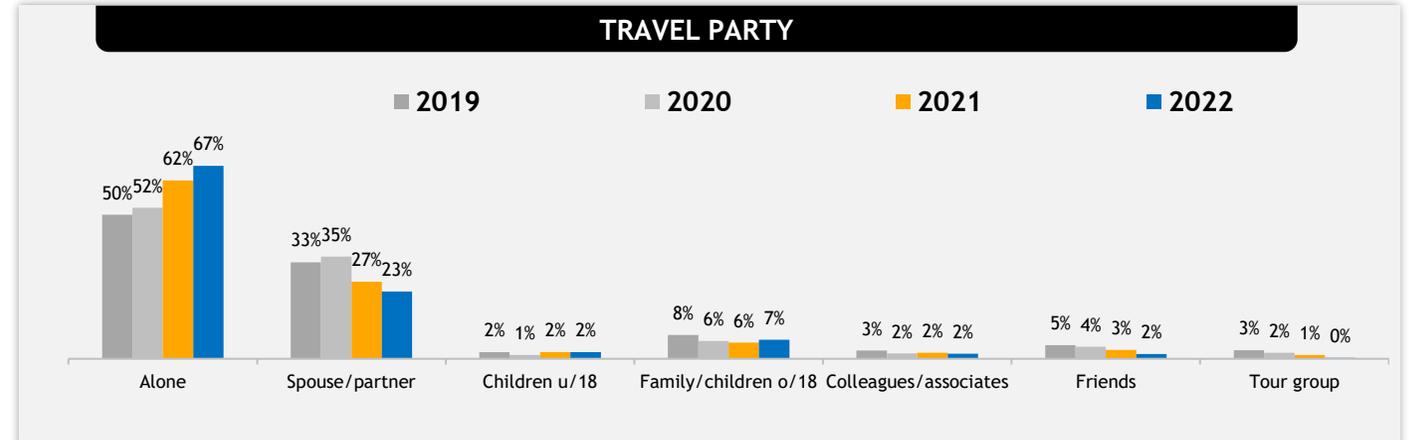
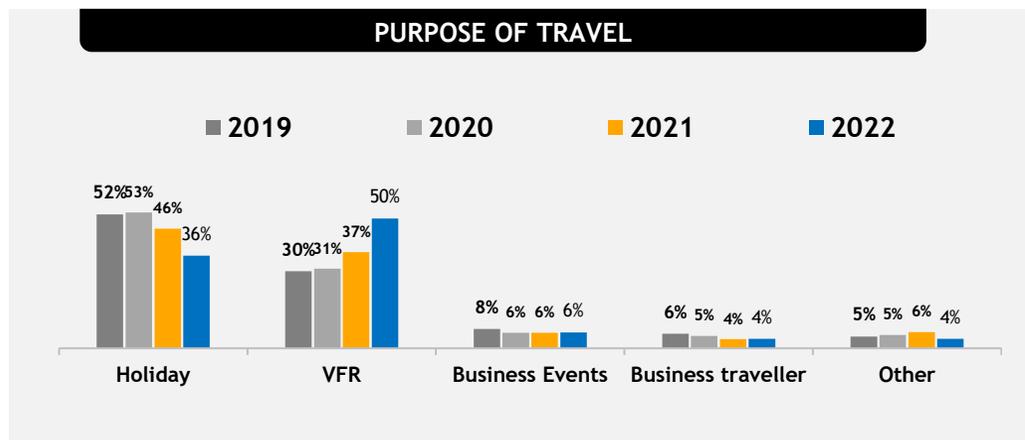
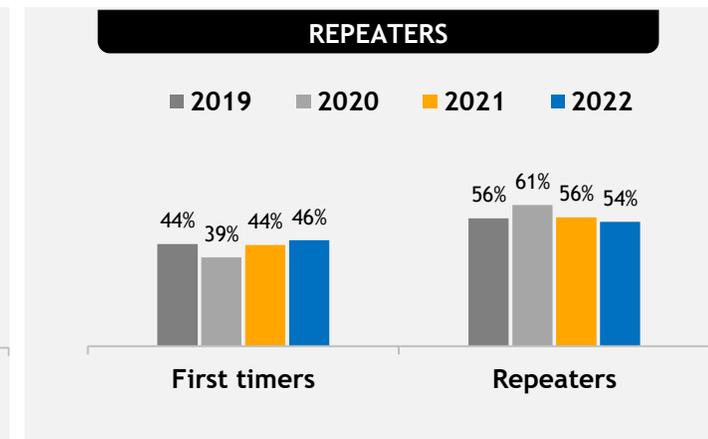
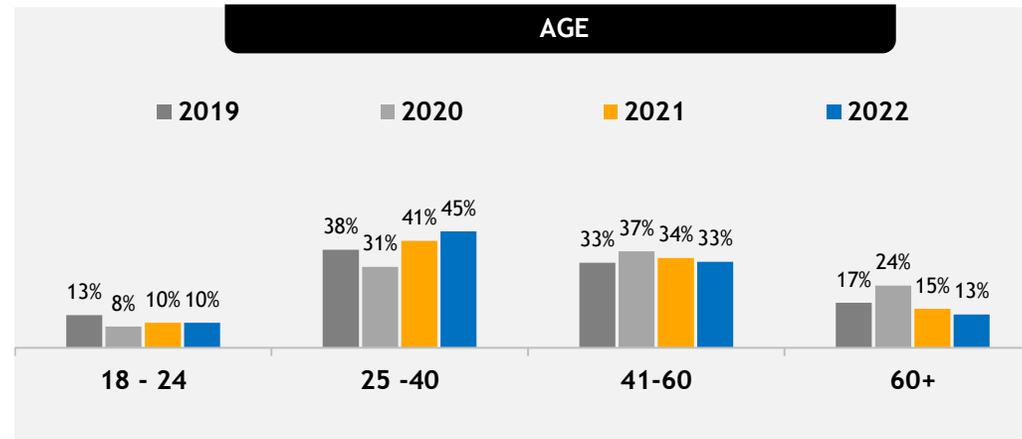
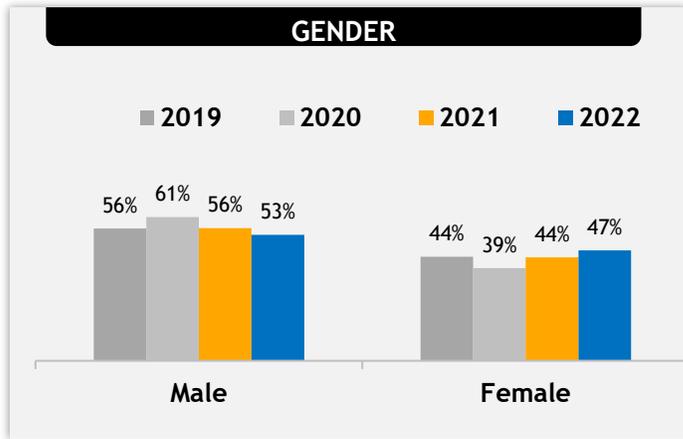


Source: Oxford Economics, SAT Targets

Note : 2020 & 2022 data is only 6 months data
 2020 Data: Jan to March, Oct to Dec
 2022 Data: Jan to June

UK CONSUMER: 2019 - 2022

Higher influx of travellers are between 25 to 40 years and they travel predominantly alone, or accompanied by a spouse, travelling for holiday or VFR

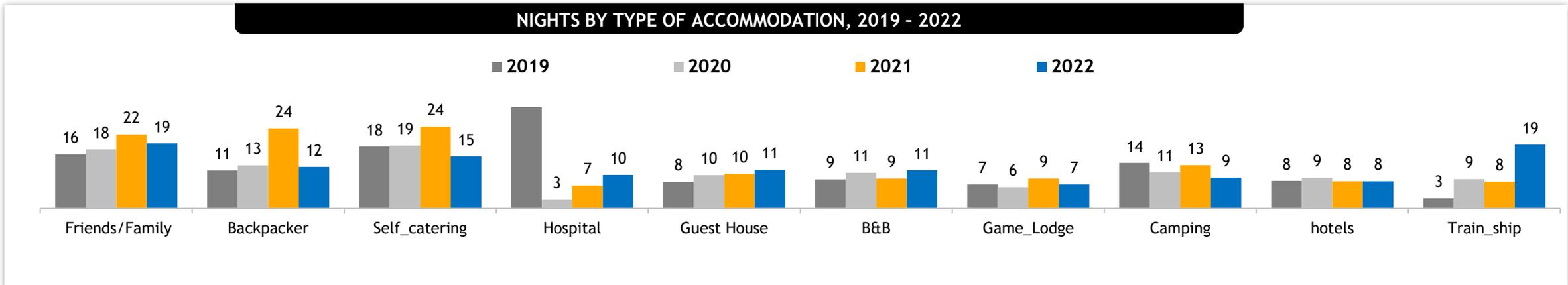
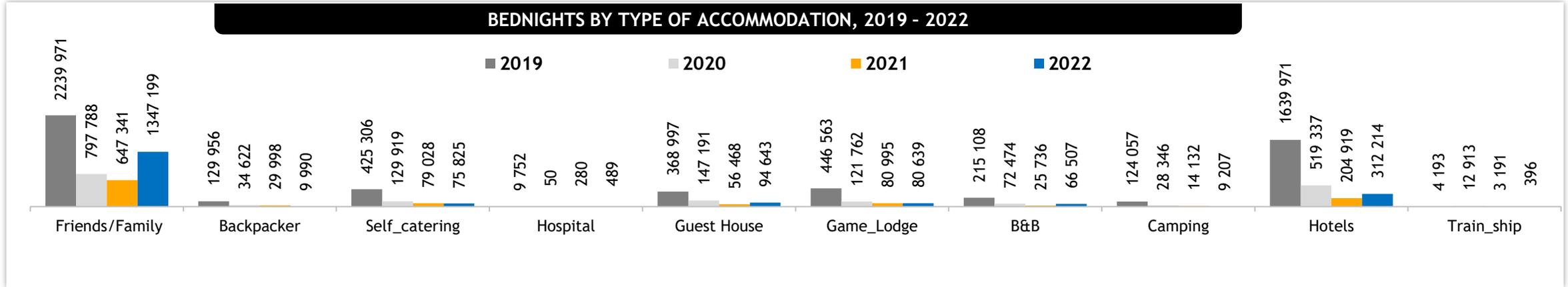


Source: StatsSA ; Departure Survey 2019- 2022

Note : that the afore figures are given as estimated average spend
 2020 & 2022 data is only 6 months data
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UK: BEDNIGHTS, 2019 -2022

Staying with Friends and Family, self catering accommodations have longer stays. UK is a VFR market, and often times when tourists are travelling for holiday they also see friends and family and hence bed nights are mostly attributed to staying with friends and family, hotel figures eroded during the two covid heavy years

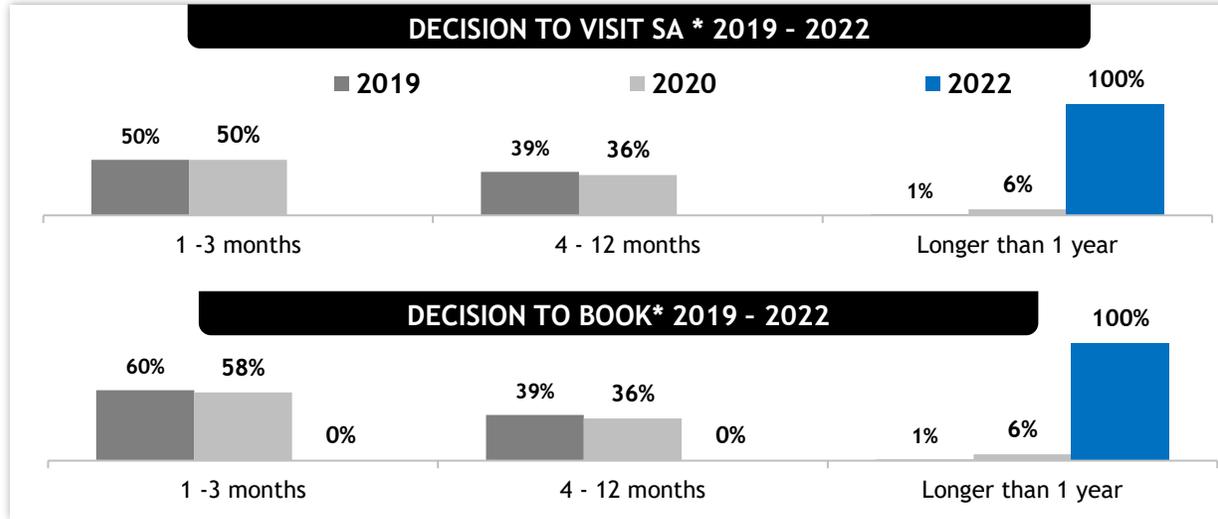


Source: StatsSA ; Departure Survey

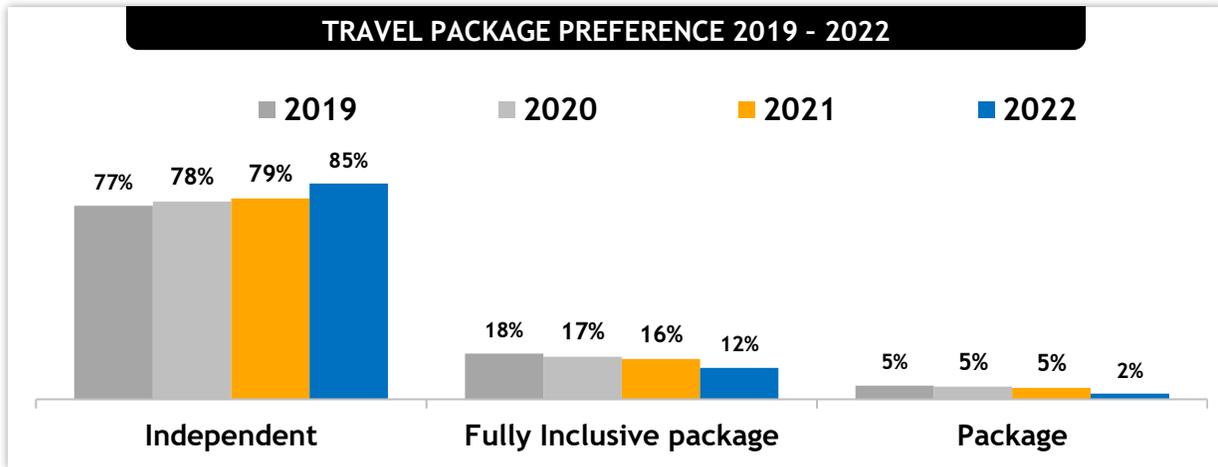
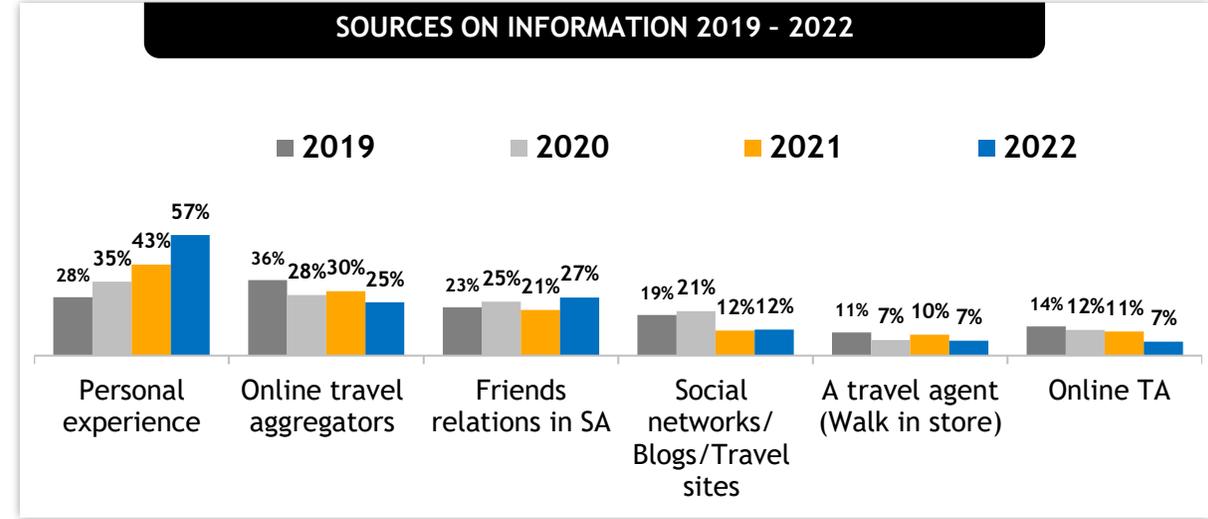
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UK: DECISION MAKING, 2019 - 2022

The Brits buy their travel in parts, and fewer do buy their travel products packaged. They source travel info mostly through other relations, travel aggregators whilst repeaters rely on experience.



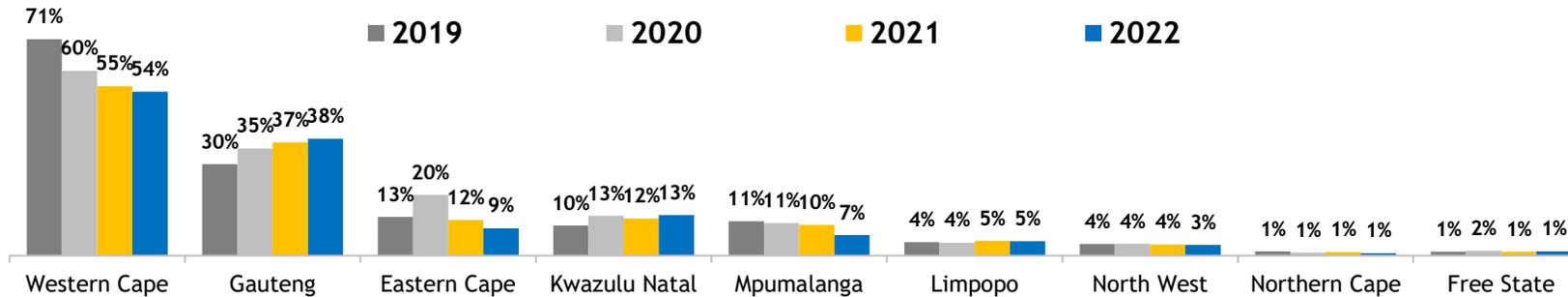
Question not asked in 2021



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UK: ACTIVITIES / ATTRACTIONS AND PROVINCES VISITED 2019 -2022

PROVINCES VISITED 2019 -2022



Overall, key activities that the Brits do when in South Africa include

- Eating out
- Shopping
- Socialising

Key destination province is Western Cape, secondary is Gauteng

Most popular attractions in the Western Cape are:

- Camps Bay
- V&A Waterfront
- Cape Town Central City
- Cape Point
- Table Mountain Cableway

Popular attractions in Gauteng are:

- Mandela Square,
- Eastgate Mall
- Rhino & Lion nature reserve

ACTIVITIES 2019 -2022

