



SOUTH AFRICAN TOURISM



2021 A BUMPER YEAR
FOR U.S. TOURISTS TO SOUTH AFRICA

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In 2021, the United States of America (USA) became South Africa's number 1 overseas market for the first time ever. Prior to this, the United Kingdom (UK) had been South Africa's number 1 market since 1994. Not only did the US market secure the top spot, but it also led in terms of growth in arrivals during the course of the year with a total of 82 020 arrivals in 2021 up 14% from 2020 and was among the top growth markets. In 2019, pre-pandemic, the USA was 2nd with 373 694 arrivals behind the UK (436 559) and ahead of Germany (322 720).

USA WAS THE TOP OVERSEAS MARKET IN 2021 (ARRIVALS AND SPEND)

The US market's outstanding performance owes a lot to both United Airlines and Delta Air Lines who continued to service the destination during the November to December rise of the Omicron variant. This despite South Africa being placed on many nations' red lists alongside other Southern African countries. Both carriers are committed to the destination and have announced expanded service and new routes for 2022. In 2021, the USA also topped the tourist revenue among the overseas

markets with R2.3 billion, which was driven by average tourist spending in South Africa being higher than pre-pandemic levels up to R31 100 from R22 900 in 2019. The increase in tourist spend from the USA was driven by leisure tourism activities (17%) and shopping (22%), with the share of wallet being maintained or increasing respectively from 2019, while other categories saw a declining share of wallet in 2021.

SA CLINCHES A SPOT ON THE USA'S BUCKET LIST

South Africa is a top bucket-list destination loved for world-class travel, a wide variety of experiences, including exclusive game reserves, and affordable-luxury accommodation options, among the US travelers. The destination is rich in active adventure, cultural, and historical offerings. It also puts tourists centre stage as they get immersed in the food, language, history, great music, fashion, arts and culture while also offering top-end wildlife, beach, and active adventure experiences that include the great outdoors, hiking trails, driving along the

coastline, and other thrilling experiences. Add to this the welcoming and friendly people, great weather, value for money for tourists, and natural attractions and it is the perfect holiday destination. In 2021, as it was in 2019, eating out, shopping, wildlife viewing, natural attractions, and socializing were among the Top 5 activities and drove the demand that led to the bumper year of US arrivals.

FIRST-TIME TRAVELERS DROVE ARRIVALS

The tourist profile and trends taken from SA Tourism's Departure Survey showed that the US market was and continues to be primarily driven by first-time travelers, who are under 45 years old and looking to explore South Africa on holiday for a week or two; either on a solo adventure or on vacation with a loved one. In 2019, more than two-thirds of tourists from the US were first-time visitors (68.3%), and this grew to 70.1% in 2021.

Tourist traveling alone or with a spouse or partner in both years (up from 75.1% in 2019 to 79.4% in 2021). More than half of tourists travel to South Africa on holiday (relatively unchanged from 2019 to 2021, 58.2% and 57.6% respectively). With a majority of tourists aged over 45 (down slightly from 57.7% in 2019 to 52.5% in 2021).



THE PANDEMIC CAUSED BOOKING CYCLES TO BE LONGER FOR TRAVEL IN 2021

Close to three-quarters of arrivals to South Africa in 2021 had planned, decided, and booked their travel to South Africa more than a year in advance. This contrasts with pre-pandemic patterns in 2019, when South Africa saw shrinking decision and booking cycles among American tourists.

Pre-pandemic, consistently around 40% the US tourists booked their travel between 4 to 12 months ahead of travel. It is, therefore, anticipated that travelers will revert to the short booking cycle trend as travel normalizes in coming years.

GAME LODGES GREW IN POPULARITY

In 2021, the top accommodation choice was staying with friends and family (0.5 million bed nights – 41% share). However, game lodges had the most growth (with share of bed nights up 5% from 2019). Visiting friends and relatives (VFR) also grew significantly (up 13% from 2019).

This trend can be attributed to the need to reconnect, alongside health concerns brought about by the pandemic, and the comfort and peace of mind that comes from staying with people one knows and trusts. When it came to paid accommodation, hotels topped the list with 248 500 bed nights (19% share in 2021, down from 28% in 2019).

EXPLORING SOUTH AFRICA'S REGIONS

In 2019, the Western Cape overtook Gauteng as the most visited province, with 67% share of US arrivals. Western Cape province also led the attractions with 9 of the Top 10 attractions visited. V&A Waterfront, Cape Point, Cape Town City Centre, Camps Bay, and Table Mountain were the most visited attractions in 2019 and have consistently been the Top 5 attractions for the American traveler in 2021. Gauteng received 46% of US arrivals in 2021, returning to its place as the top province for US tourists. Western Cape came a close 2nd with a 44% of arrivals and still led in total spend (down to 28% share of spend from 51% in 2019)

and total bed nights (down to 34% share of bednights from 45%). Compared to 2019, Gauteng saw significant growth in share of both bed nights (up 10% to 29% in 2021) and spend (up 7% to 25% in 2021). Sandton City, Mandela's House in Soweto, Tour of Soweto, and the Apartheid Museum are the top attractions in the province and among the Top 20 attractions for the market. Limpopo was the only other province to see a growth in share of arrivals and spend, up by 1% and 9% respectively in share. Kruger National Park was the top Limpopo attraction in both 2019 and 2021.

WHAT TRADE SHOULD KNOW

South Africa has been reopened for tourism since November 2020, and as of June 2022, proof of vaccination at all ports of entry will no longer be required. Mask mandates have been removed owing to the limited imminent risk and sustained lower rates of infections. The limitation on events and gatherings has also been lifted, which will have the greatest impact on the meetings and business event sector.

South Africa has reached 50% of the population at least on one dose of the vaccine and this justifies the dropping of social distancing requirements set in the regulations to mitigate COVID-19. Travel to South Africa from the USA is expected to recover to 2019 levels in 2027.



Knowing what tourists want and packaging great value, natural scenery, wildlife experiences with immersive cultural experiences and interaction with local food, active adventure, and friendly people can speed the recovery of this market. We see in our data, that American tourists seek wildlife, natural scenery, beach, and adventure activities and with restrictions being lifted we expect to see these become top activities again. After the disappointment of repeatedly canceled trips and postponed celebrations, the American traveler is ready to make up for lost time, finally take that long-awaited holiday and go big. The US tourist is ready for their Greatest of All Trips (GOAT). They are putting themselves first and are out to get the trip of a lifetime with the affordable luxury experiences they feel they deserve. Americans are ready to Live Again and South Africa's recent campaign speaks to the themes that will resonate with the US market.

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