Tourism Ireland

SOUTH AFRICA MARKET SNAPSHOT

SOUTH AFRICA MARKET PROFILE | 2014

SOUTH AFRICA MARKET OVERVIEW

POPULATION	52 million
GDP PER CAPITA (US $)	6,003
ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)	3.6 %
MAJOR CITIES	Johannesburg/Durban/Cape Town
LANGUAGE(S)	Afrikaans (14%) /English (10%) 9 African languages (76%)
CURRENCY	ZAR

SOUTH AFRICA OUTBOUND TRAVEL

YEAR	2010	2011	2012	2013 (est)
NUMBERS	1,855 Million	1,872 Million	1,821 Million	1,875Milllion
YEAR ON YEAR GROWTH %	12%	1%	-3%	3%
VISITOR NUMBERS TO EUROPE	580,000	600,000	606,000	624,180
YEAR ON YEAR GROWTH %	8%	3%	1%	3%

PURPOSE OF TRAVEL (% SHARE OF VISITS)

Leisure 40%

Business 40%

VFR 15%

Other 5%

TOP 5 DESTINATIONS TO VISIT

WORLD WIDE

1. Indian Ocean Islands
2. Thailand
3. USA
4. Europe
5. United Kingdom

EUROPE

1. United Kingdom
2. France
3. Germany
4. Italy
5. Spain

PEAK TRAVEL PERIODS

MONTH	AVERAGE LENGTH OF HOLIDAY
May to September	7 to 10 Days
December	7 to 10 days

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OUTBOUND TRAVEL TO IRELAND

MARKET	2009	2010	2011	2012	2011 V'S 2012 % VARIANCE
South Africa	30,000	22,000	25,000	26,000	4%

TOURISM IRELAND'S TARGET MARKETS / SEGMENTS

NAME	AGE	PROFILE	% OF TOTAL POPULATION	HOW DO THEY BOOK THEIR HOLIDAY?	ACCOMMODATION TYPE WHILE ON HOLIDAYS	HOW DO THEY LIKE TO TRAVEL WITHIN IRELAND?	KEY REQUIREMENTS FROM IRISH INDUSTRY FOR THIS SEGMENT
Traditional	45 - 59	White, English speaking, well travelled, enjoy unusual destinations, adventurous, highly educated, balance work, family and busy life, information and technology are important	1% of population and 30% of outbound travel market	Travel Agent Online	5 star 4 star	Self drive	Good price Excellent service Delivery of promises Promotional offers
Mature	60 – 70	White, English speaking, retired, financially independent with high disposable income, include VFR, travel for longer periods	0.7% of population and 20% of outbound travel market	Travel Agent Online direct	5 star 4 star 3 star	Self drive, Coach tours Rail tours	Good price Excellent service Delivery of promises Promotional offers
Sports travel	35+	Predominantly male, white, English & Afrikaans speaking, travel as a group to attend or watch sports, follow team, enjoy travelling to cities	0.4% of population and 15% of outbound travel market	Sport travel operator	5 star 4 star 3 star	Group tours	Creative packages incorporating sporting experiences, games and activities

WEEKLY FLIGHTS & SEATS FROM KEY CITIES IN SOUTH AFRICA TO IRELAND

DEPARTURE CITY	NO. OF FLIGHTS PER WEEK	NO OF SEATS	INDIRECT AIRLINES
Johannesburg	70	21,000	Air France, British Airways, Emirates, Etihad Airways, KLM, Lufthansa, Turkish Airlines
Cape Town	56	16,000	British Airways, Emirates, KLM, Turkish Airlines.
Durban	7	2,100	Emirates

VISA REQUIREMENTS

TO REPUBLIC OF IRELAND

No Visa Required

TO NORTHERN IRELAND

UK Visa Required

IRELAND'S STRENGTHS AND OPPORTUNITIES FOR TARGET MARKET

IRELAND'S STRENGTHS

1. No visa required for the Republic of Ireland
2. Friendly people
3. Easy to self drive around Ireland
4. Variety of unique experiences
5. Familiar culture and language

IRELAND'S OPPORTUNITIES

1. South Africa is an emerging market
2. Wild Atlantic Way launch
3. Popularity of St Patrick's Day
4. Ancestral links and diaspora. Over 30,000 South Africans have an Irish passport
5. Strong relationship with Irish agencies to promote brand Ireland

Top 5 Attractions

1. Guinness Storehouse
2. Titanic Belfast
3. Blarney Castle
4. Cliffs of Moher
5. Giant's Causeway

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TRAVEL TRADE MARKET

TRAVEL TRADE	OVERVIEW	% OF TOURISM IRELAND'S TARGET MARKET BOOKING THROUGH THESE PROVIDERS
Tour Operators / Wholesalers	16 tour operators selling international travel	15%
Travel Agents	Over 1,000 retail travel agents across South Africa made up of 6 major consortiums	65%
MICE	12 incentives houses organising MICE travel overseas	10%
Online Travel Agents	Travelstart is the main South African based OTA	5%
Online direct with airlines & hotels	Booking.com, hotels.com and airlines are the key players	5%

TRAVEL TRADE MARKET

TRAVEL TRADE	CURRENTLY PROGRAMME IRELAND
1. Thompsons Holidays	Ireland 3-11 day FIT and group tours
2. Holiday Tours	Ireland 6-8 day FIT and group tours
3. Travel Vision	Ireland 5-9 day FIT and group tours
4. Emirates Holidays	Ireland 8 day FIT tours
5. British Tips	Ireland and UK & Ireland 6-10 day FIT and group tours
6. United Europe	Ireland FIT and group tours
7. Trafalgar	Ireland and UK & Ireland 6-19 day coach tours
8. Insight Vacations	Ireland and UK & Ireland 9-22 day coach tours
9. Rail Europe	Ireland FIT tours
10. Cosmos Globus	Ireland coach tours

TRAVEL TRADE MARKET

Top 5 Media Channels for Consumers: Radio, Television, Print, Online, Outdoor

Top 5 Media Channels for Travel Trade: Travel News Weekly, Travel Info, Travel Industry Review

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TRAVEL TRADE MARKET

For more information on Tourism Ireland's opportunities in South Africa or to join Tourism Ireland's Country Club Programme for China, India or GCC please visit:

tourismirelandindustryopportunities.com

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