Table of Contents

- Africa within our marketing portfolio
  - Trends at play in Africa
  - West Africa
    - Insights into the West African traveller
    - Perceptions of South Africa
  - East Africa
    - Insights into the East African traveller
    - Perceptions of South Africa
<table>
<thead>
<tr>
<th>Africa is Important</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Africa delivers the most tourist arrivals</strong></td>
</tr>
<tr>
<td>- Africa is the base-load of international tourism to South Africa, delivering more than 70% of tourist arrivals every year</td>
</tr>
<tr>
<td>- Tourist Arrivals from Africa grew at ~8% annually during 2009–2013.</td>
</tr>
<tr>
<td><strong>Africa is growing</strong></td>
</tr>
<tr>
<td>- Africa witnessed a growth in GDP from 3.3% in 2011 to 6.4% in 2012, and is forecast to grow from the projected 4.8% in 2014 to 5.7% in 2015¹</td>
</tr>
<tr>
<td>- Arrivals from Africa Air to South Africa, increased at a much faster rate of 11.6%, compared to the average growth rate of 8.9% in arrivals from the rest of the world, during 2009–2013</td>
</tr>
<tr>
<td>- The value that Africa brings to the South African economy goes beyond tourism (i.e., hotels and attractions), and has major benefits for the whole economy (especially in manufacturing and other downstream industries)</td>
</tr>
<tr>
<td><strong>Africa is accessible</strong></td>
</tr>
<tr>
<td>- Africa is South Africa’s natural hinterland</td>
</tr>
<tr>
<td>- Accessibility of South Africa to a significant number of travellers, particularly those in Southern African countries, and their familiarity with the country are the major benefits</td>
</tr>
<tr>
<td>- South Africa captures more than 50% of total outbound departures from Africa countries</td>
</tr>
<tr>
<td><strong>Africa’s still more untapped potential</strong></td>
</tr>
<tr>
<td>- South Africa has the potential to further exploit its proximity and strength as a choice destination in the African market, which is still emerging from purpose-based travel into a true leisure-driven tourism market</td>
</tr>
<tr>
<td>- South Africa receives a relatively small number of travellers from countries other than African countries, which implies that there is tremendous opportunity for growth</td>
</tr>
</tbody>
</table>

Source: ¹http://www.africaneconomicoutlook.org/statistics/
Tourist arrivals to South Africa for the year 2013 grew by 4.7% over 2012 to reach 9,616,964. All regions showed positive growth and Africa continues to account for the largest share of arrivals.

- **Africa**: 6,889,389 arrivals (+3.8% from 2012)
- **Europe**: 1,494,978 arrivals (+7.0% from 2012)
- **Central & South America**: 129,463 arrivals (+8.0% from 2012)
- **North America**: 417,582 arrivals (+6.1% from 2012)
- **Asia**: 435,076 arrivals (+9.2% from 2012)
- **Australasia**: 148,660 arrivals (+4.0% from 2012)
- **Middle East**: 57,382 arrivals (+5.9% from 2012)
- **Indian Ocean Islands**: 24,394 arrivals (+13.3% from 2012)

Note: Tourist Arrivals figures shown above for Jan. - Dec 2013
Source: Table A Tourist Arrivals Jan. - Dec 2013
We consider Africa in different regions classified by the means of travel to South Africa.

**Africa Land (AFRL)**
- Countries where more than 60% of arrivals to SA use land-based transport
- Accounts for 68% of tourist arrivals to SA
- Countries: Botswana (BOT), Lesotho (LES), Malawi (MAL), Mozambique (MOZ), Namibia (NAM), Swaziland (SWA), Zambia (ZAM), Zimbabwe (ZIM)

**Africa Air (AFRA)**
- Countries where more than 60% of arrivals to SA use air transport
- Accounts for 5% of tourist arrivals to SA
- Countries: Angola (ANG), Democratic Republic of Congo (DRC), Ethiopia, Ghana, Kenya (KEN), Nigeria (NIG), Tanzania, Uganda, Middle East, Indian Ocean Islands

**Africa (AFR)**
- 72% of tourist arrivals to SA
- Includes Africa Land (AFRL) and Africa Air (AFRA)

Note: ¹Africa Land (AFRL) includes South Africa in ‘Region Overview’ section only
Source: Statistics SA Tourism & Migration report P0351 2013, SAT Analysis
Tourist arrivals from the Africa air markets grew the fastest compared to all other regions between the period 2011 and 2013.

Tourist Arrivals to South Africa and the World, 2011 to 2013

Note: Africa Air Markets are markets where at least 60% arrive to SA use air transport; Africa Land Markets are markets where at least 60% of arrivals to SA use road transport. Long-haul markets include all countries outside of Africa.

The share of tourist arrivals from the Africa Air Markets to South Africa increased during 2009–2013 with Ghana and Tanzania realising the greatest growth over the period.

Source: Statistics SA, Tourism & Migration reports 2009 to 2013
Revenue from Africa Air markets grew by 5.6% between 2009 and 2013. In 2013, Nigeria was leading in revenue (30%) followed by Angola, DRC and Kenya.

Africa Air Revenue to SA, 2009–2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Revenue to SA (R’ billion)</th>
<th>Africa Air’s share of Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>R 59.2</td>
<td>4.1%</td>
</tr>
<tr>
<td>2010</td>
<td>R 72.6</td>
<td>3.3%</td>
</tr>
<tr>
<td>2011</td>
<td>R 71.0</td>
<td>4.1%</td>
</tr>
<tr>
<td>2012</td>
<td>R 74.2</td>
<td>3.8%</td>
</tr>
<tr>
<td>2013</td>
<td>R 70.3</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

Source: Statistics SA, Tourism & Migration reports 2009 to 2013; SAT Departure Surveys 2009 to 2013
West African Market Analysis – Ghana and Nigeria

- Arrivals from the core West African markets have more than doubled since 2009; *moving from 54k to 112k*
- Nigeria accounts for approximately three quarters of the core West African markets

- Revenue from Ghana and Nigeria grew by 15% from 2009 from R687 million to R1,193 million in 2013
- The split in revenue between Ghana and Nigeria is proportionate to that of arrivals

Note:¹West Africa is only represented by Ghana and Nigeria

Source: Statistics SA, Tourism & Migration reports 2009 to 2013; SAT Departure Surveys 2009 to 2013
East African² Market Analysis – Kenya, Tanzania and Uganda

- Jointly the three East African markets realised growth in tourist arrivals of 15% from 52,6k in 2009 to 91,1k in 2013

- Tanzania surpassed Kenya as the leading source of tourist arrivals from this region in 2012 and accounts for approximately 42% of tourist arrivals from this region

- Although Tanzania leads in terms of tourist arrivals from the region, Kenya contributes the most in terms of revenue

Note:²East Africa is only represented by Kenya, Tanzania and Uganda
Source: Statistics SA, Tourism & Migration reports 2009 to 2013; SAT Departure Surveys 2009 to 2013
Table of Contents

- Africa within our marketing portfolio
- Trends at play in Africa
  - West Africa
    - Insights into the West African traveller
    - Perceptions of South Africa
  - East Africa
    - Insights into the East African traveller
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Outbound travel from African markets is estimated to grow at a steady rate, primarily driven by a robust economic growth in the region.

- Outbound travel from Africa grew in 2013 reaching 33.4 Million outbound travellers in 2013 as compared to 31.9 Million travellers in 2012
  - The YoY growth rate in 2013 was **4.8% YoY**, a considerable drop from 2012 YoY growth rate of 6.1%
- The market share of African outbound travellers remained steady in 2013 at **3.1%**, compared to the share of outbound travellers from Africa in 2012
  - From 2010 to 2013, the growth rate of African outbound travel exceeded the global growth rate in outbound travel volume

**Factors Supplementing Growth**

- **Growth in income and urbanisation** are among the driving factors for the growing tourism activity
  - Households in middle class having annual income between US$5,500 and US$8,500, have tripled in size over past 14 years
- **Rich cultural heritage and historical monuments** have driven international tourism within Africa
- **International partnerships** (e.g., Thai-Africa initiative for economic and developmental cooperation) have also been influential

**African Travellers, 2011–13**

- **4.8% growth in 2013**
- **6.1% growth in 2012**
- **30.06 million, in 2011**

"**As countries in Africa develop their economies and the number of people with sufficient disposable income to travel increases, we can expect to see a steady above average rise in international travel in the years to come. This will benefit countries both within and outside Africa.**"

– Rolf Freitag, president of IPK International, tourism consulting company, 2014

The volume of African travellers is likely to rise within Africa and outside, inline with the growth in modes of travel via air route and land which is expected to remain consistent.

- Inbound African travellers are expected to increase by **46.5 Million** till 2030 compared to an increase of **13.6 Million** in the volume of inter continent African travellers during the same period.
- Some countries such as Kenya, Zimbabwe have launched promotional schemes specifically targeting at more travellers from African continent.

### Travel Volume within Africa

- **Africa Outbound Travel Volume (in Million)**
  - **Within Africa**: 22.5 in 2010, 40.0 in 2020, 69.0 in 2030 with a **CAGR of 5.8%**.
  - **Outside Africa**: 7.4 in 2010, 13.0 in 2020, 21.0 in 2030 with a **CAGR of 5.4%**.

### Transport Utilised for Travel

- **African Outbound Travellers on the Basis of Transport Used (in Million)**
  - **By Air**: 19.1 in 2010, 34.0 in 2020, 58.0 in 2030 with a **CAGR of 5.6%**.
  - **Over Surface**: 10.8 in 2010, 19.0 in 2020, 32.0 in 2030 with a **CAGR of 5.7%**.

- Outbound travel, both via air and land transport has shown consistent growth in recent years and is likely to maintain a steady CAGR of **6%** from 2010 to 2030.
- Among all regions, Africa demonstrated the **strongest growth (+8%), in 2013**, in air travel owing to stabilising economy and overall growth.
  - **Low-cost airlines** such as ‘fastjet’ and ‘flydubai’ have added new routes to take advantage of growing demand in East Africa.
- **Land based tourism** is likely to remain one of the key factors to drive the outbound travel within Africa.

African travellers continue to face challenges related to visa for travelling, both within Africa and other regions such as APAC and Americas, thus hampering international travel.

### Destination Regions

#### Africa

- Though, a higher percentage of African travellers travelling within Africa require no visa unlike Europeans or Americans, more than half of the African travellers require visa within the region.

#### APAC

- African travellers face very stringent visa policies while travelling to APAC region, compared to American and European travellers, with over two-thirds of the African travellers requiring visa.

#### Americas

- Americas is the toughest region for African travellers to travel to in terms of visa requirements, with over three-fourths of the African travellers requiring visa to Americas.

### African travellers face much stringent visa policies compared to European and American travellers, not only while travelling outside Africa but also during international travel within the continent.

Fast economic growth and rise in disposable income is expected to positively influence the international tourism in within Africa, as well as the domestic tourism within countries

According to an ITB report, African countries are likely to witness rise in their disposable incomes along with overall development in economy, thus resulting to increase in travel related activities.

Poor connectivity, infrastructure and difficulty to get Visas are a major hindrance to travel from one country to another, within Africa.

**Domestic Tourism**

- **2013 Travel Behaviour**
  - 59.6% Contribution of domestic travel to the GDP
  - US$71.1 Billion Spent on domestic travel, constituting 3.6% of the total GDP

**International Tourism**

- **2013 Travel Behaviour**
  - 33.4 Million Africans travelled internationally, for leisure purposes, in 2013
  - 5% Growth was witnessed during 2012–2013 (YOY basis)

**Forecast**

- 4.8% Expected growth of spending on domestic travel during 2014–2024
- 5.5% Expected growth in outbound international travel during 2014–2015

**Notes:** 1Gross Domestic Product; 2Internationale Tourismusbörse

While African travellers prefer destinations within Africa for varied interests such as safaris and beaches, those who travel outside Africa are more inclined toward emerging economies.

- Initially, African travellers’ demand for vacation was dependent on their inclination towards coastal areas.
- There has been a shift in this trend with rise in popularity of safaris as a viable option.

According to the World Bank, abundance of natural resources in Sub-Saharan Africa is expected to raise the annual GDP of the region. Thereby, augmenting the spending capacity and the appetite for international travel.

Safety and security is one of the major concerns for Africans travellers as they seek peaceful destinations.
- As of 2014, Ebola outburst is also one of the major factors restricting travel to and from West African Countries.

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Safety and security is one of the major concerns for Africans travellers as they seek peaceful destinations.
- As of 2014, Ebola outburst is also one of the major factors restricting travel to and from West African Countries.

African travellers mostly rely on friends and family for information about holiday destination and depend on travel agents for travel booking preferring traditional payment methods.

**Preferences of the African Travellers**

### Source of Information
- Most Africans take advice from **friends and family** while deciding on a holiday destination; however, **internet** is also a preferred source for some Africans.

### Payment Choices
- Owing to the lower penetration of credit cards and other forms of plastic money in Africa, **cash** remains the preferred mode of transaction.
- African travellers **seek credit cards as modern and more aspirational**.

### Travel Booking
- Travellers from African countries **rely on traditional sources** for booking and planning their holidays and travel.
  - A significant number of Africans consider **online booking as a complex procedure**.
  - They are eager to pay for vacations which are personalised according to their needs.

**According to a VISA Survey...**

- **29%** Prefer Packaged Tours: Fewer Africans sign up for **packaged or guided tours**, while travelling internationally, for the purpose of holidays.
- **55%** Willing to Pay Travel Agents: More than half of African vacationers are **willing to pay travel agents** for tour planning and bookings.
- **15** Average Number of Nights in International Stay: Travellers from Africa prefer longer holidays, staying on an average of **15 nights** at international destinations.

Recent developments in the aviation sector in Africa is expected to boost domestic as well as international travel

- The market share for air travel and over the surface travel has remained stable since 2010
  - Air travel comprises **36%** of the absolute international travel while travel over the surface constitutes for the rest **64%**
- Despite a sharp rise expected in the total number of African travellers, the share of travellers utilising land and surface transport is expected to remain constant
- Increasing number of low cost carriers is going to positively impact the volume of air traffic within the African continent

<table>
<thead>
<tr>
<th>Year</th>
<th>By Air</th>
<th>Over Surface</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>8,3</td>
<td>12,2</td>
</tr>
<tr>
<td>2010</td>
<td>10,8</td>
<td>19,1</td>
</tr>
<tr>
<td>2020E</td>
<td>19,0</td>
<td>34,0</td>
</tr>
<tr>
<td>2030E</td>
<td>32,0</td>
<td>58,0</td>
</tr>
</tbody>
</table>

Note: E—Estimated; PATA—Pacific Asia Travel Association; ATA—Africa Travel Association
African travellers prefer to stay connected during a vacation; coastal experiences and shopping are among the other major preferences of African travellers.

According to TripAdvisor and VISA, Africans Like to...

- **Travel Economically**
- **Have Fun**
- **Shop**
- **Stay Connected**
- **Relax**
- **Enjoy the Coastal Culture**

- **Affluent** Africans prefer **luxurious** travel, while others seek for a value for money holiday destination.

- African travellers prefer to stay connected with their world back at home:
  - They like to share pictures and experiences while at a vacation.

- Africans intend to relax, have fun and share a memorable experience during their vacations.

- Africans prefer travelling to international destinations to experience beaches and coastal areas.

- **Shopping** is among the major influencing factors for African travellers travelling within Africa.

Table of Contents

- Africa within our marketing portfolio
- Trends at play in Africa

- West Africa
  - Insights into the West African traveller
    - Perceptions of South Africa

- East Africa
  - Insights into the East African traveller
  - Perceptions of South Africa
Sketch of a West African Traveller

A Typical West African Traveller Wants to...

**Feel Respected**
- West African travellers seek the respect travellers from other countries receive at an international destination

**Chase their Fantasies**
- Most travellers believe that vacationing at an international destination enables them to realise their dreams

**Heighten their Social Standing**
- Travelling to international destinations makes West Africans experience a sense of pride and accomplishment

**Seek New offerings at the Destination**
- Many travellers wish to experience more from the outside world, they seek a hassle free environment at the destination

**Seek Nature’s Abode**
- Tranquillity and serenity of the vacation destination are of prime importance to West Africans; they want to have a break from their routine life

**Broaden their Horizons**
- West African travellers want to learn new cultures and all about the destination that they visit

**Augment their Business Opportunities**
- West Africans constantly seek opportunities to form new professional associations and grow their business

Source: Focus Group Discussions in Nigeria and Ghana, 2014
Travellers from West Africa consider visiting different places, shopping and cultural exchange to be their primary purpose of visiting an international destination.

1. **Exploration**
   Visiting different places is the most common purpose of travel for West African travellers.

2. **Shopping**
   Shopping emerges as an activity which the travellers tend to enjoy while travelling.

3. **Culture Exchange**
   There is a common desire among the West African travellers to learn more about different cultures.

4. **Interaction with People**
   Travellers from the East African markets expressed their willingness to interact with the local people while travelling and wish to learn more about them.

5. **Relaxation**
   West African travellers also want to relax and spend peaceful time when they travel internationally.

Source: Focus Group Discussions in Nigeria and Ghana, 2014
Family vacations and business needs are the two main sources of inspiration for the West African travellers to take an international trip

- A lot of West African travellers also mentioned travelling for business as one of their source of inspiration to take an international trip
  
  “We just decided to go and bring in goods for some of our customers so it was business and pleasure mixed up. But we spent just a week”
  
  — Ghana

  “I did say that I’m into real estate and there was a real estate for sale and a chap introduced me to the president of the Nigerian community in Stokong, I have to go there to process my business.”
  
  — Nigeria

- Family vacations and visiting friends and relatives was the other important source of inspiration for the West African travellers to travel internationally
  
  “What inspired us, we needed to travel as a family, we were all traveling with the kids so we went to Wales, that is where my husband went to school so we all went there and it was awesome”
  
  — Nigeria

  “When I get back to the UK it is primarily to see my children but it is also a chance to catch up with my friends because all my friends are there”
  
  — Ghana

Country Level Comparison

The triggers for International travel remain nearly consistent across both the markets

Source: Focus Group Discussions in Nigeria and Ghana, 2014
Drivers to international travel for travellers in West Africa primarily include various events such as sports events, seminars or business conferences and weddings.

**Events**
Travellers across West Africa mentioned occurrence of events such as fashion shows, music event, sports tournament, etc. as major driver for international travel.

"Especially if let’s say the world cup lets go there and celebrate with the friends"
— Ghana

"I have travel to acquire more knowledge like attending seminars, workshops; I will pay my personal money to go"
— Nigeria

**Business Forums**
Most of the travellers cited business conferences and seminars as crucial driver while deciding for international travel.

**Weddings**
Travellers considered weddings or some family functions as a vital driver to international travel.

"I paid to travel to London for a wedding"
— Nigeria

**Country Level Comparison**
These factors are considered as key drivers for international travel across most of the West African countries.

Source: Focus Group Discussions in Nigeria and Ghana, 2014
Travellers across West Africa considered money, weather, distance and visa process as some of the major barriers to international travel

<table>
<thead>
<tr>
<th>Money</th>
<th>Weather</th>
<th>Distance</th>
<th>Visa Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The expensive nature of various international destinations is a major barrier for international travel to travellers across Western Africa</td>
<td>• Weather conditions is also a very important concern for travellers while deciding on an international travel destination</td>
<td>• Distance while travelling is important in deciding on international destination as more travellers prefer short distance travels or direct flights</td>
<td>• Travellers also faced visa related issues while booking / going on an international trip</td>
</tr>
</tbody>
</table>

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**Country Level Comparison**

Travellers from both the countries had similar barriers for an international travel, however, few travellers from Ghana also mentioned lack of time as a deterrent.

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Source: Focus Group Discussions in Nigeria and Ghana, 2014

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“**Money**

- "It's **Cash, Switzerland is expensive, they are not in EU**" — Nigeria

- "I for instance as I said nothing will be a barrier, the **weather is the only thing that can**" — Ghana

**Weather**

- "**Barriers to international travel is for places that there are no straight flight**" — Nigeria

- "For me the only barrier I have is not my barrier but my fiancé’s barrier because he needs a visa but for me I will generally get a visa" — Ghana

**Distance**

- "**Country Level Comparison**

Travellers from both the countries had similar barriers for an international travel, however, few travellers from Ghana also mentioned lack of time as a deterrent

---

Source: Focus Group Discussions in Nigeria and Ghana, 2014
West African travellers usually plan 3–4 months before the actual travel; they also seek information on weather conditions & costs through internet

- 3–4 months is the average time duration before actual travel, when most West African travellers start planning their trip
  - Few travellers also mentioned 2 weeks for a quick holiday plan

  “3–4 months - When I want to go to the Seychelles then I will start planning a good three to four months before but when I am going to UK I can just be at home and decide in three weeks”
  — Ghana

- The most important information sought by the West African travellers is weather, security, cost, food and touring opportunities

  “For me the weather because I need to know what to buy, you go during winter and then you don’t watch the weather it can be terrible”
  — Nigeria

- Travellers from Nigeria spend on an average USD 4,000, while from Ghana spend USD 2,000 for a 2 week vacation
  - The cost also varies depending upon the travel purpose and activities conducted

  “Travelling alone without my family one thousand pounds which is like Two hundred and fifty thousand”
  — Nigeria

Country Level Comparison

Travellers from all the West African markets echoed similar thoughts about the frequency, duration and spend while comparing their international and domestic travel behaviour

Note: 1 Based on current exchange rate from OANDA.com; 1 USD = NGN 164.836; 1USD = GHS 3.0439
Source: Focus Group Discussions in Nigeria and Ghana, 2014
With the availability of online booking facilities to compare and book tickets, travellers generally make bookings themselves; however, few travellers still prefer using travel agents.

Source of Information

- **TV Channels**
  - In Nigeria, most popular TV channels are CNN, Discovery, Al Jazeera, Nat Geo Wild, and Africa Magic, while in Ghana KTV, Al Jazeera, CNN, Viasat 1 were the most popular.

- **Radio Stations**
  - Radio stations such as MFM, 94.1 FM Rainbow, 96.1 Traffic Radio were popular in Nigeria, while Beat FM, Joy FM and Sunny FM were popular in Ghana.

- **Online Websites**
  - West African travellers visit booking.com, wakanow.com, tripadvisor.com and various tourism board websites to gain various information on their travel destinations.

Mode of Booking

- Most of the West African travellers prefer to book their holidays themselves, while a few still use travel agents/ agencies for convenience.

Country Level Comparison

While TV channels and radio stations are equally important in both the markets, use of internet to gather information is more prevalent among the Nigerian travellers.

"I do everything by myself, I don’t do it through an agent"
— Nigeria

“For me, the protocol office handles it for me; they have travel agents they are dealing with”
— Nigeria

Source: Focus Group Discussions in Nigeria and Ghana, 2014
Table of Contents

- Africa within our marketing portfolio
- Trends at play in Africa

- **West Africa**
  - Insights into the West African traveller
  - Perceptions of South Africa

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Nigerians (core market in West Africa), have high-levels of awareness of South Africa, but relatively low levels of familiarity in comparison.

### Total Awareness and Familiarity
(based on all respondents)

<table>
<thead>
<tr>
<th>Month</th>
<th>Aided Awareness</th>
<th>Unaided Awareness</th>
<th>Top-of-Mind Awareness</th>
<th>Percent Very Familiar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov-12</td>
<td>82%</td>
<td>36%</td>
<td>13%</td>
<td>25%</td>
</tr>
<tr>
<td>Feb-13</td>
<td>86%</td>
<td>38%</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>Nov-13</td>
<td>92%</td>
<td>46%</td>
<td>17%</td>
<td>36%</td>
</tr>
<tr>
<td>Feb-14</td>
<td>90%</td>
<td>38%</td>
<td>17%</td>
<td>34%</td>
</tr>
<tr>
<td>Nov-14</td>
<td>92%</td>
<td>33%</td>
<td>13%</td>
<td>33%</td>
</tr>
</tbody>
</table>

**Aided (Q9):** Which of the following countries have you heard of as an international destination for leisure purposes prior to this survey? *(Select all that apply)*

**Unaided (Q7):** I would like to begin by asking you about international destinations for leisure purposes. By this we mean “foreign countries that you may consider visiting for leisure and enjoyment.” When you think about “international destinations for leisure purposes,” which countries come to mind?

**Top-of-Mind (Q7):** First mention to unaided awareness question.

**Percent “Very Familiar” with Each Country (Q11):** Of all respondents, the percentages who are “very familiar” with each as an international destination for leisure purposes.
West African travellers mentioned South Africa to be beautiful, friendly, strong and organised

“A hero, if Nelson Mandela was a hero then South Africa is a hero”
– Ghana

“To me a South African will look handsome, at the same time a beautiful person”
– Ghana

Source: Focus Group Discussions in Nigeria and Ghana, 2014
West African travellers relate South Africa with words such as Beautiful, Mandela and Developed; words such as Unsafe and Xenophobia also appear top-of-mind.

“The environment is a lot more organised than what we have here in Nigeria, it is also a good traveller destination”
— Nigeria

“One of my friends said that they were robbed right in the taxi they took from the airport”
— Nigeria

Source: Focus Group Discussions in Nigeria and Ghana, 2014
Table of Contents

- Africa within our marketing portfolio
- Trends at play in Africa
- West Africa
  - Insights into the West African traveller
  - Perceptions of South Africa
- East Africa
  - Insights into the East African traveller
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### Sketch of an East African Traveller (1/2)

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014

#### A Typical East African Traveller Wants to…

<table>
<thead>
<tr>
<th><strong>Feel Welcomed</strong></th>
<th><strong>Travel, as it is a Reward for Hard work</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>East African travellers want to feel welcomed and like to be treated equally just like the travellers of other countries are treated at international destinations</td>
<td>Most travellers consider travel as a reward for their hard work; they believe travel helps them to rejuvenate and feel refreshed when they come back to their daily routine life</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Be Respected</strong></th>
<th><strong>Gain Knowledge to Improve Oneself</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>The travellers from East Africa feel that they should be treated with respect and say that they deserve equality</td>
<td>The travellers from East Africa consider travelling as a significant part of their life as it helps them in gaining knowledge and to improve their country as a whole</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Seek First-hand Experiences</strong></th>
<th><strong>Break-away from the Daily Routine</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>East African travellers seek for a first hand experience of different places, this makes the travel significant to them</td>
<td>East African travellers believe that travel allows them to break their daily routines and they enjoy living without any timelines giving them a sense of freedom</td>
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</table>
A Typical East African Traveller Wants to…

**Make the Best of the Stop-overs**
- East African travellers want to make the most of their trips. Thus, they prefer to even explore the stop-over halts, while travelling on a long distance journey.

**Explore History**
- The historical stories of a country attracts the East African travellers to travel to various international destinations. They want to attain deeper knowledge about the places of historical significance.

**Turn Dreams to Reality**
- East African travellers consider their dream destination to be a once in a lifetime experience; they want to experience the places which they have seen in a movie or pictures.

**Bring Back from the Outside World**
- Travelling enables the East African travellers to experience new places and cultures which helps in expanding their horizons; travelling keeps them motivated.

**Seek Experiences which are Authentic not Superficial**
- East African travellers seek pure and authentic experiences during their travel. The travellers want to interact with the locals and also like to understand the lifestyles and customs of the people.

**Make the Most of Life**
- Travel gives the East African travellers an opportunity for ultimate indulgence and the travellers want to experience everything possible during their travel.

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
East African travellers’ primary purposes of travel include relaxation, cultural exchange and business; leisure and the desire to visit newer places also feature on this list.

1. **Relaxation**
   - Travellers from East Africa wish to break from their monotonous life and relax over a holiday.

2. **Cultural Exchange**
   - A common desire among East Africans travellers makes them believe that exploring different cultures helps them expand their knowledge.

3. **Business Needs**
   - Travelling for various business purpose and needs was a common reason cited by East African traveller.

4. **Leisure**
   - Travelling for leisure is of prime importance among East Africans – it is seen as a way to reward oneself after an achievement.

5. **Exploration**
   - East African travellers want to visit newer places; they seek unique and enriching experiences specific to a destination.

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
The needs related to business, attending special events and festivals inspire the East Africans to travel to international destinations

- A lot of East African travellers mentioned business needs as their prime source of inspiration to travel to international destinations
  
  “I travel mostly for business but every year, I have my target that I have to visit trade wise”
  
  — Kenya

  “For me I combine, I make sure when I travel and go for business, I also design that its business, I can design it that when I leave here”
  
  — Uganda

- International events, especially related to sports was one of the main sources of inspiration for East African travellers to travel internationally

  “It was an occasion that I wouldn’t miss and the world cup is there once in four years and I love football.”
  
  — Uganda

  “London: I went for the London Marathon”
  
  —Kenya

Country Level Comparison

Business is a key inspiration for traveller from Uganda and Tanzania to travel internationally; while travellers from Kenya and Uganda mentioned that sports events inspired them to travel

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
In addition to the opportunities to learn new cultures, availability of time, nice weather and accommodation at the destination are the key considerations of the travellers.

**Time, Weather and Accommodation**
The availability of leisure time, moderate weather and hospitable luxurious accommodation are identified as crucial drivers for East African travellers.

**Learning**
East Africans expressed a desire to learn from people of other countries and soak in the positives from their cultures.

**Country Level Comparison**
These factors are considered as key drivers for international travel across East African countries.

*Johannesburg,* The hospitality of that side. There are some hotels I went to and the treatment was so good and loving
— Kenya

The weather conditions, like for example if its winter you cannot just sleep outside you must live in the house, even the houses themselves are conditioned to suit the weather
— Kenya

The person who introduced the catalogue did a lot for her to long to visit Madagascar so the indicators like letting us know what is in a given country is a driver
— Uganda

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
Majority of the East African travellers considered money, language, security and discrimination as major barriers to international travel for leisure purposes.

- **Cost**: Costly international travel is a major barrier for travellers hailing from East Africa, and wishing to travel to different countries.

  - “Cost is always a big factor, it’s no need going to a place that damages your bank statement and maybe you have a mortgage and you start thinking.” — Kenya

- **Language**: The difference in the spoken languages is also considered as a prime barrier by East African travellers to visit an international destination.

  - “Language. Like in Germany they just speak German, not that they don’t know English, but they don’t want to speak English.” — Kenya

- **Safety and Security**: Safety and security standards of the destination is also a crucial parameter in finalising the travel destination.

  - “The security of the place because a couple that was on honey money, there the lady was sexually harassed by the son of a famous drug dealer” — Uganda

- **Discrimination**: Travellers also reported incidences of racial discrimination as a hurdle while going to an international destination.

  - “What would stop me from going to a country is racism” — Uganda

**Country Level Comparison**: Government regulations and poor representation of home country at the destination is a major barrier for people from Kenya and Tanzania.

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
East African travellers usually plan their vacation well before the travel; they seek information on the internet, and roughly spend USD 4,500–5,500 on a two week long vacation.

In general, the travellers take around 3–6 months to plan a trip to an international destination. Few travellers also plan well ahead in time, which takes around 1–1.5 years for a long haul travel.

“I plan for 6 months because I have to save some money and early booking so as to get low rates and best hotels as well because it is for leisure” — Tanzania

The most important information sought by the East African travellers is affordability, security, accommodations available and touring opportunities.

“Cost, security then the weather because I would not go to a place in winter” — Uganda

For a two week vacation, on an average, the travellers from Kenya and Uganda spend about USD 4,000-5,000, while Tanzanians spend around USD 2,800-3,500 during their vacation.

“It depends with session sometimes its 750,000/= and sometimes its 1.5 million depending on session and the country that you are visiting” — Uganda

East Africans broadly seek information on exchange rates, cost of living, transportation and accommodation at the travel destination; Travellers from Uganda try understanding the culture of the destination country as well.

**Country Level Comparison**

Note: 1 USD = KES 87.9001; 1 USD = TZS 1,663.95; 1 USD = UGX 2,597.27

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
East African travellers predominantly seek information from television channels and radio stations; they prefer using travel agencies to consult and book their holidays.

### Source of Information

- **TV Channels**
  - For Kenya, most popular TV channels were History, BBC Africa, CNN and Nat Geo, while DSTV was popular Pay TV operators; NBS and NTV in Uganda; and Discovery in Tanzania.

- **Radio Stations**
  - Radio stations such as Family, Milele, Rhumba, Classic 105 are popular in Kenya, while 91.3 Capital FM and Spirit 96.6 was popular in Uganda.

- **Online Websites**
  - East African travellers do not utilise specific websites, rather they follow a few travel blogs and perform random search online.

### Mode of Booking

- **East African travellers prefer consulting and using professional travel agencies to book their travel.**

  - "Travel agents, so as to pay one month before my trip takes off and I also chose what airline to book"  
    — Tanzania

  - "Well it’s better to use the airline agent for example if it is Emirates then the agent comes from there"  
    — Tanzania

### Country Level Comparison

Apart from television, internet sources are also consulted by travellers across East African countries to educate themselves of the destination; however, radio was particularly popular in Kenya and Uganda.

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
Table of Contents

- Africa within our marketing portfolio
- Trends at play in Africa
- West Africa
  - Insights into the West African traveller
  - Perceptions of South Africa
- East Africa
  - Insights into the East African traveller
  - Perceptions of South Africa
While Kenyans (a core market in East Africa) have lower levels of awareness compared to the Nigerians, there was an increase in their levels of familiarity with South Africa.

Aided (Q9): Which of the following countries have you heard of as an international destination for leisure purposes prior to this survey? (Select all that apply)

Unaided (Q7): I would like to begin by asking you about international destinations for leisure purposes. By this we mean “foreign countries that you may consider visiting for leisure and enjoyment.” When you think about “international destinations for leisure purposes,” which countries come to mind?

Top-of-Mind (Q7): First mention to unaided awareness question.

Percent “Very Familiar” with Each Country (Q11): Of all respondents, the percentages who are “very familiar” with each as an international destination for leisure purposes.

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**Total Awareness and Familiarity**
(based on all respondents)

Aided Awareness
Unaided Awareness
Top-of-Mind Awareness
Percent Very Familiar With

Percent very familiar with
Based on all respondents

Nov-12 23% (n=400)
Feb-13 22% (n=400)
Nov-13 25% (n=400)
Feb-14 19% (n=350)
Nov-14 41% (n=350)
South Africa is perceived as a tourist destination among the East African travellers, also as a nation with advanced infrastructure and rich cultural history associated with Nelson Mandela.

You know being in a place where Mandela has been is just enough, going to a place where he was staying, going to a place where he was arrested”
— Uganda

“It’s a developed country and those pictures tell me that we don’t know much about it”
— Tanzania

Apart from these positive factors, travellers across all the three East African countries are concerned about the security situation in South Africa.

Country Level Comparison

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
South Africa’s personality is perceived as highly elegant, classy and, beautiful among East African Travellers

“\nI mean she is a lady, she is single and she is 35 years old, she has to like you to talk to you. But that doesn’t mean you will get her
— Kenya

“\nI think she is accommodative because she had struggled a lot, so she is a bit enthusiastic”
— Kenya

Source: Focus Group Discussions in Kenya, Tanzania and Uganda, 2014
For more information contact our Johannesburg office:

South African Tourism
Bojanala House
90 Protea Road
Chislehurston
Sandton, 2196

Private Bag X10012
Sandton 2146

Call centre: +27 11 895 3000
Email address: info@southafrica.net
Website: www.southafrica.net