



SOUTH AFRICA MARKET SNAPSHOT

SOUTH AFRICA MARKET PROFILE | 2015



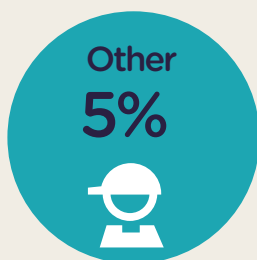
SOUTH AFRICA MARKET OVERVIEW

POPULATION	52 million	
GDP PER CAPITA (US \$)	6,620	
ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)	1.9%	
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)	2014 (est)
NUMBERS	1,855 Million	1,872 Million	1,821 Million	1,809Million	1,908Million
YEAR ON YEAR GROWTH %	12%	1%	-3%	3%	1.8%
VISITOR NUMBERS TO EUROPE	580,000	600,000	606,000	624,180	670,000
YEAR ON YEAR GROWTH %	8%	3%	1%	3%	7%

PURPOSE OF TRAVEL (% SHARE OF VISITS)



TOP 5 DESTINATIONS TO VISIT

WORLD WIDE

1. UK
2. Thailand
3. UAE
4. USA
5. France

EUROPE

1. UK
2. Italy
3. France
4. Greece
5. Turkey

PEAK TRAVEL PERIODS

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



OUTBOUND TRAVEL TO IRELAND

MARKET	2013	2014	2013 vs 2014 % Variance
South Africa	25,000	28,000	12%

Tourism Ireland best estimate



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 3star	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 and other touring routes
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 Associations to engage in tourism brand awareness

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	10%
Travel Agents	Over 1,000 retail travel agents across South Africa made up of 6 major consortiums	60%
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	15%

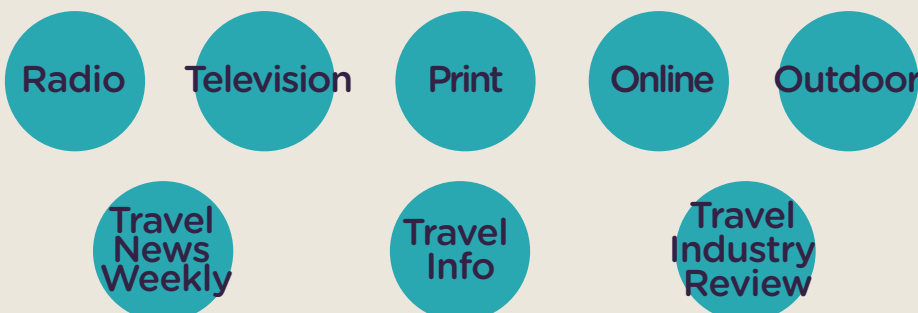
TRAVEL TRADE MARKET

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. British Tips | Ireland and UK Ireland 6-10 10day FIT and group tours |
| 5. United Europe | Ireland FIT and group tours |
| 6. Trafalgar | Ireland and UK & Ireland 6-19 day FIT and group tours |
| 7. Insight vacations | Ireland and UK & Ireland 9-22 day FIT and group tours |
| 8. Cosmus Globus | Ireland coach tours 7-11 coach tours |
| 9. Icon Holidays | Ireland and UK 7-16 Days FIT and Groups Tours |
| 10. Travel and Sport | Ireland and UK & Ireland Leisure, Sport and School groups |

TRAVEL TRADE MARKET



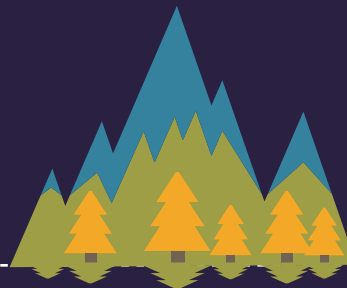
Top 5 Media Channels for Consumers

Top 3 Media Channels for Travel Trade

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 Tourism Ireland



CONTACT INFORMATION

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