



Discover the alternative

Business Travel Trends Q4-2022

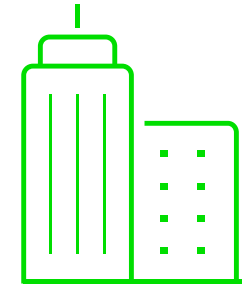
Demand for business travel

+26%

Internationally compared with Q4-2019
More businesses want to get in front of their customers. MICE return to non-virtual and hybrid models.

-30%

South Africa Domestically compared with Q4-2019
Impacted by high pricing of seats.



Travel Industry Recovery

RECOVERED

Hotels

Improvements (indexed to 2019, full-year 2022)

- Hotel occupancy
- Top 3: Central America 101% South America / Middle East 96% North America 95%
- Southern Africa 92%
- Selling more room nights

Challenges

- Increase in labour costs to attract staff
- Average global rates to increase +7% in 2023
- Slow return to dynamic discounts



RECOVERING

Air Travel

Improvements

- Airline seat capacity +18% globally compared with Q4-2021
- More staff in airports
- Less time needed for check-in
- Better boarding processes

Challenges

- Travellers no longer 'travel fit'
- Travel costs to remain high for 6 months



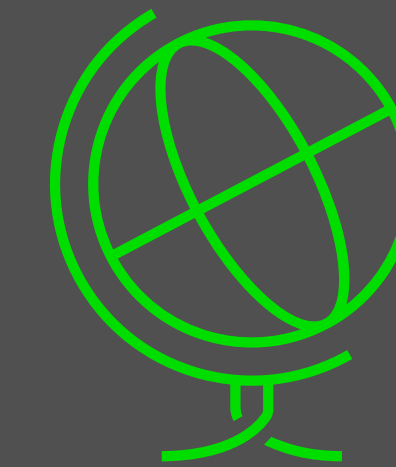
CHALLENGED

CAR HIRE

- Car type and size not always available for customers
- Availability for road warriors and in smaller towns compromised

SA Top Business Destinations Q4-2022

INTERNATIONAL	REGIONAL	RECOVERED
London	Gaborone	Johannesburg
Dubai	Harare	Cape Town
Mali	Maun	Durban



Sustainable Business Travel

GLOBALLY

Already entrenched globally

SOUTH AFRICA

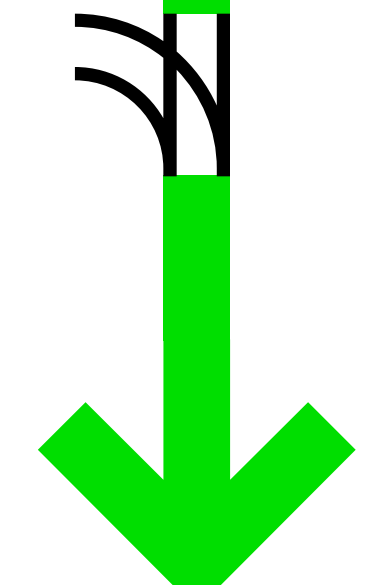
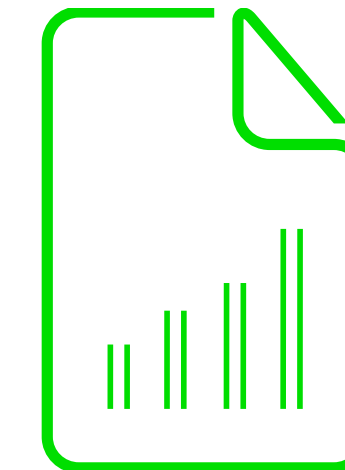
New talking point

Clients Asking For

REAL-TIME REPORTING

Why?

Visibility to inform travel policy to work towards net-zero goals



Key | Q4- (October-December)

Learn more