



# TOURISM PERFORMANCE

## 1st QUARTER REPORT

January-March 2022



*Inspiring new ways*

# DEFINITIONS



- **Visitor** - Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.
- **Same day visitor** - Any person who visits a place without staying the night.
- **Tourist** - A visitor who stays at least one night in the place visited.
- **International Tourist** - An international visitor who stays at least one night in collective or private accommodation in the country visited.



- **Domestic Visitor** - A visitor whose country of residence is the country visited. They may be nationals of this country or foreign nationals.
- **Domestic Tourist** - A resident of the country of reference who spends at least one night in the place visited outside of his/her usual environment.
- **Overnight Trip** - A journey undertaken by one or more members of the household for at least one night away from home, where the persons travelling did not receive any remuneration (did not make any profit) at the destination. For a trip to be complete, the person must return to his/her place of residence.
- **Usual Environment** - To be outside the usual environment the person should travel more than 40 kilometers from his/her place of residence (one-way) AND the place should NOT be visited more than once a week. This includes their place of work and place of study. Leisure and recreational trips are included irrespective of frequency.

# ABOUT THE REPORT

## INTERNATIONAL TOURIST ARRIVALS

This report was prepared by South African Tourism's Analytics and Insight's Unit and is based on South African Tourism's Departure Survey that has been deployed by SA Tourism since 2001 to monitor and measure international tourist behaviour as they leave South Africa. The survey aims to track tourist travel behaviours, expenditures, accommodation usage, experiences, as well as satisfaction of South Africa as a holiday and business destination. The survey began as a point-in-time survey conducted in winter and summer.



The survey is conducted monthly and covers SA's two main international airports (Oliver Tambo and Cape Town) as well as the 12 main land border posts (Grobler's Bridge, Maseru Bridge, Oshoek, Golela, Kopfontein, Pioneer Gate, Lebombo, Beitbridge, Vioolsdrift, Nakop, Ficksburg, Ramatlabama), the latter being the largest point of entry into South Africa by foreign nationals. Durban's King Shaka International Airport as well as all sea ports are currently excluded from the survey as they receive less than 5% and 1% of international tourist arrivals respectively.

The survey is based on a random stratified sampling framework of  $n=3,800$  per month for both of the airports and  $n=1,000$  per month for all land border posts. The sample framework is derived from Statistics South Africa (StatsSA) tourist arrivals data and the survey results weighted back according to the same tourist arrivals' data. The margins of error for the airport and land border post monthly samples are 1.6% and 3.1% respectively, both at a 95% confidence level. As such, the survey accurately represents tourists arriving in South Africa as well as their behaviours and opinions. Arrival numbers given are actual tourist arrivals from StatsSA and not tourist arrivals as calculated by the survey. When crossed with other survey variables, tourist arrival numbers are survey based.



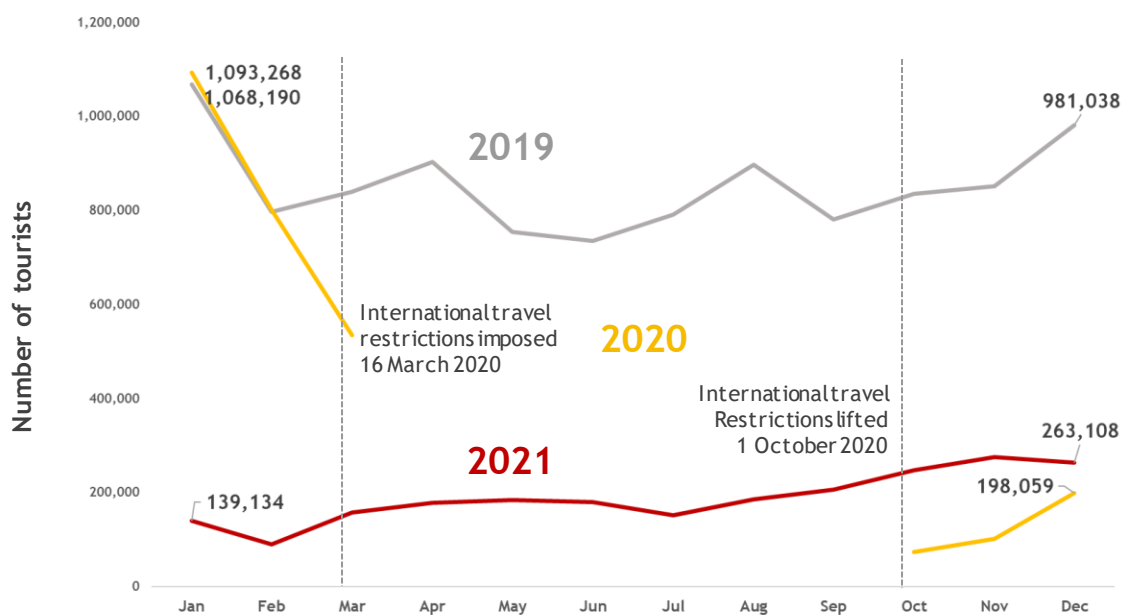
# ABOUT THE REPORT

## IMPACT OF COVID-19 ON THE SURVEY

Due to the Covid-19 pandemic, surveying international tourists at airports and land border posts became impossible and the survey stopped at the end of March 2020. Surveying land border posts became possible only in November 2020 but airports remained impossible to survey till mid-August 2021. Hence, land border post data was imputed for October 2020, and for airports, October-December 2020 data was imputed. The process was based on corresponding and comparable retrospective values for which full data sets were present.\* Imputation is the process of replacing missing data with substituted values whereby projections of missing data are based on an existing mathematical relationship present in the available data set.

Since interviewing at the airports became possible only in mid-August 2021, data for Q1 2021 was obtained through readjusting Q1 2020 data for visit purpose recorded by StatsSA in Q1 2021. The output was then weighted based on number of arrivals from different markets. The assumption was made that tourists visiting the country for similar purposes are likely to visit similar attractions and, on average, stay for the same duration. For Q2 of 2021, the same data processing was conducted as had been done to Q1 2021 but using Q2 2019 data as there had been no international tourist arrivals in Q2 2020. Interviewing at the Oliver Tambo International Airport resumed in mid-August 2021, and in the Cape Town International Airport in September 2021. Hence, Q3 2021 numbers are based solely on data collected from mid-August till September end and weighted to cater for July and early August. From Q4 2021 onwards, numbers shown are based on survey data collected.

International Tourists Arrivals in SA, 2019-2021<sup>1</sup>



<sup>1</sup> Tourism2020, Statistics SA, 29 April 2021.



# ABOUT THE REPORT

## DOMESTIC TOURISM STATISTICS

South African Tourism's Domestic Survey is conducted through in-home face-to-face interviews - the most feasible interview approach for this type of study, in order to ensure high data quality. The sample is designed as a multi-stage, stratified sample of  $n=1,300$  per month. The sampling framework is built from geographic strata based on enumerator areas (EAs) used as primary sampling units (PSUs), and households, used as the secondary sampling units (SSUs). In each EA drawn, four households are systematically selected with an equal selection probability. However, the EAs are disproportionally allocated to the main strata in order to ensure sufficient representation of domestic tourism from smaller provinces. The sample design ensures all stratification variables such as province, metro, urban, rural, race, age and gender are covered. The domestic survey has a margin of error of 2.7% at a confidence level of 95% for the monthly sample. Results are weighted based on Stats SA's mid-year population estimates of SA residents aged 18 and above, and as such, the sample is representative of SA's adult population.

Due to the Covid-19 pandemic, surveying in-home face-to-face became impossible and the survey stopped at the end of February 2020. The survey was renewed in July 2020 (for March travel). Quotas have been achieved in full since although this has not been without difficulty. Interviewers received special training on how to overcome respondent fears; laminated cards were produced and sanitized in front of the respondents; interviews conducted outside the gates; interviewers instructed to keep face masks and shields on at all times except for a few seconds of introduction and identification; social distancing at the respondents' house; as well as using our own private transport. ■



# ABOUT THE REPORT

## ADDITIONAL SOURCES USED IN THIS REPORT:

- UNWTO World Tourism Barometer Volume 20, Issue 2, March 2022.
- ‘Air Travel Sees Strong Demand Recovery in January’, IAATA, 10<sup>th</sup> March 2022.
- ‘Passenger Recovery Accelerates in February’, 6<sup>th</sup> April 2022.
- ‘Passenger Traffic Recovery Continues in March’, IAATA, 4<sup>th</sup> May 2022.
- Air Passenger Market Analysis January-March 2022, IAATA.
- UNWTO Recovery Tracker, <https://www.unwto.org/unwto-tourism-recovery-tracker>.
- Statistical Release P0351: Tourism and Migration, 1<sup>st</sup> Quarter 2022, Statistics SA.
- ‘Economic Outlook’, 2022 Budget Review, The National Treasury of South Africa, 23<sup>rd</sup> February 2022.
- ‘GDP Increased by 1.9% in the First Quarter of 2022’, Statistics SA, 7<sup>th</sup> June 2022.
- Statistical Release P0441: Gross Domestic Product, 1<sup>st</sup> Quarter 2022, Statistics SA.
- Statement by the Cabinet, Union Buildings, Tshwane, 30<sup>th</sup> December 2021.
- Statement by the President on Progress in the National Effort to Contain the Covid-19 Pandemic, 22<sup>nd</sup> March 2022.
- Latest Vaccine Statistics, Ministry of Health, [sacoronavirus.co.za/latest-vaccine-statistics](https://sacoronavirus.co.za/latest-vaccine-statistics), 31<sup>st</sup> March 2022.
- Update on Covid-19, Ministry of Health, [sacoronavirus.co.za](https://sacoronavirus.co.za), 31<sup>st</sup> March 2022.

# NOTE TO THE READER — TIME COMPARISONS



The Covid-19 has dealt the tourism industry in South Africa as well as around the world a harsh blow ever since it began in March 2020. Still to this day, the tourism industry has yet to fully recover from the pandemic and remains largely affected by it. Being given tourism's performance is still at low levels, progress made in 2022 cannot be evaluated against the previous year since 2021 was harshly impacted by Covid-19. In other words, comparing 2022 results to 2021 results would paint a much rosier picture than reality. Consequently, the view taken in this report as in all international reports by leading tourism bodies (UNWTO, IAATA), is to compare Q1 2022 performance to that of Q1 2019 - a quarter unaffected by Covid-19. This comparison shows the extent to which tourism has returned to pre-Covid-19 levels or not. With this in mind, all of South Africa's international and domestic tourism performance KPI's, except for geographic spread, were calculated over 2019 thus setting the bar higher.

However, in order to show what progress has been made since the outbreak of Covid-19 in March 2020, growth rates and other comparisons are also made over 2021 where deemed necessary and insightful. *To highlight where Q1 2022 figures are compared to Q1 2021, those figures are in italic font in the narrative. In charts which include growth comparison to 2021, this is indicated by italicized % Growth YOY or alternatively % Basis Point Change YOY.* Geographic spread for both international and domestic tourism is compared to 2021 results since a methodology change effected in 2020 renders a comparison to 2019 impossible. South Africa's Q1 2022 GDP growth is also over 2021 as Statistics SA has yet to release a comparative figure over 2019.





## DISCLAIMER

SA Tourism's Analytics and Insights Unit makes every effort to publish reports that are error-free. However, with the large number of complex records that are analyzed, we cannot guarantee that all reports are totally free of error. All errors that are detected are immediately corrected and the latest version of the report is always made available on [www.southafrica.net/research](http://www.southafrica.net/research).

To access this report online please visit the research section on the South Africa Tourism website at [www.southafrica.net/research](http://www.southafrica.net/research) or for more information e-mail: [research@southafrica.net](mailto:research@southafrica.net).

# EXECUTIVE SUMMARY

- International tourism continued its recovery in the first quarter of 2022 with much better performance compared to the weak start of 2021. However, world arrivals were still -61% over 2019. Recovery in the first quarter was impacted by the Omicron variant and the re-introduction of travel restrictions in several destinations as well as the outbreak of the Ukrainian conflict (20<sup>th</sup> February).
- International tourist arrivals to SA amounted to 1.0 million tourists thus showing *phenomenal recovery when compared to Q1 2021 (+170.7%)* but still a dramatic decline versus Q1 2019 (-61.3%). SA's recovery is much better than that of Asia-Pacific and remains on par with the rest of Africa, the Middle East and the world on average.
- Africa Land tourists amounted to 742.0 thousands, accounting for the majority of all arrivals (70.8%), although they had declined by -60.9% over 2019 *whilst +125.6% higher than Q1 2021*. Africa Air tourists were 36.3 thousands (3.5% share), meaning -58.5% less than Q1 2019 *but +135.2% more than Q1 2021*. Zambia, Namibia, Mozambique & Kenya, lead African priority markets' recovery, with all four declining by less than the -52.5% average (over 2019).
- European arrivals, 192.9 thousands (18.4% share), declining -58.8%, to have grown *much over Q1 2021 (+683.1%)*. Americas arrivals declined -66.8% vs. 2019 but *increased by +477.0% over Q1 2021* to total 44.6 thousands (4.3%). Expectedly, Asia still shows the greatest losses (-76.2% vs. 2019, 17.9 thousands, 1.7% share) *but has grown +129.2% since Q1 2021*. Australasian arrivals, 7.2 thousands and a 0.7% share, *have recovered the most over Q1 2021 (+1,017.5%)* but have declined -73.1% over 2019. The Middle East, 5.0 thousand arrivals and a 0.5% share, saw a decline of -58.2% over Q1 2019, but a *growth of +329.7% over Q1 2021*.
- In terms of overseas priority markets, Russia continues to lead, showing the highest recovery level of -36.4%, and is joined by the UK, the latter showing recovery of -39.7% in March 2022 (both over Q1 2019). A marked reversal in Russia's recovery is clear from February onwards due to the Ukrainian conflict.
- VFR continues to dominate recovering to 42.0%, bringing it back to 2019 levels (41.8%). Business Shopping has returned to 2019 levels with an 11.8% share (9.0% in 2019). Holidays have yet to recover, and their 15.3% share is still far from 22.2% in 2019. Business Travel maintains a much larger share (13.2%) than it did in Q1 2019 (2.9%).
- Spend by international tourists has recovered to ZAR 10.4 billion, falling by -59.4% over 2019, showing *growth of +131.5% over 2021*. Africa's spend declined the least (-51.5% vs. Q1 2019), increasing share to 36.8%. Asian & South American tourists' declined the most.
- Average foreign spend has increased by +7.4% over Q1 2019 but has *decreased over Q1 2021 by -13.6%* when average spend reached a peak of ZAR 11,800. Clearly, *the reduction over the previous year* is due to the relaxation of Covid-19 regulations and the ability to travel more freely and without quarantine.
- Length of stay has gone up by +11.1% and over Q1 2019 *and by +50.0% over Q1 2021* to total 12.4 nights, marking a complete recovery. Bed nights have yet to recover fully, amounting to 12.7 million, declining by -56.6% vs. Q1 2019, *growing +301.4% over Q1 2021*.
- Satisfaction has improved overall and is now 4.6, driven by African tourists. All other regions, except Asia, are showing lower satisfaction. Most significant are losses vs. Q1 2019 for the Americas (-0.9), Australia (-0.7) & the Middle East (-0.5). The question remains whether this is temporarily due to Covid-19 or other circumstances are at play.

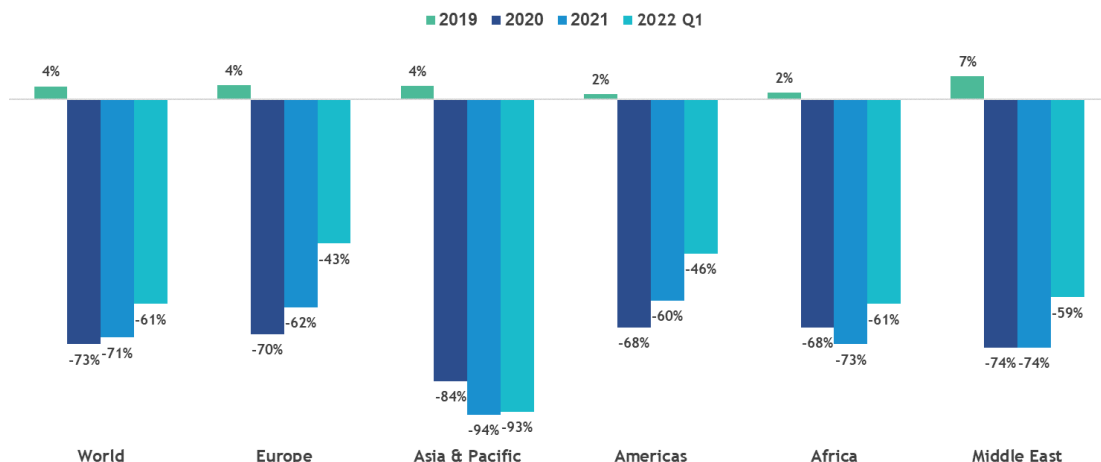
# GLOBAL TOURISM OUTLOOK



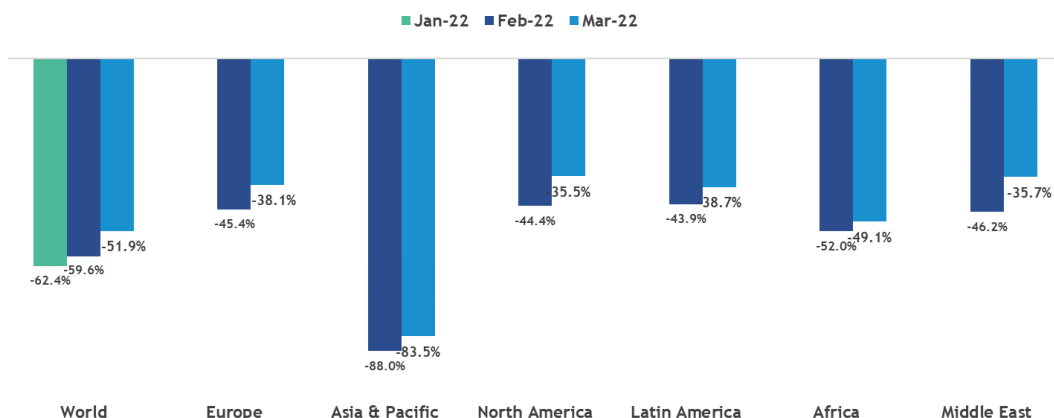


International tourism continued its recovery in the first quarter of 2022 with much better performance compared to the weak start of 2021. However, world arrivals were still -61% compared to 2019, after reaching -60% in Q4 2021.<sup>1</sup> Recovery in the first quarter was impacted by the Omicron variant (January)<sup>2</sup> and the re-introduction of travel restrictions in several destinations as well as the outbreak of the Ukrainian conflict (20<sup>th</sup> February).<sup>3</sup> Strengthened border controls did not stop the variant but where population immunity was strong, public health systems were not overwhelmed. Consequently, many governments have begun to adjust Covid-19 policies to align with those in place for other endemic viruses. Impact from the Ukraine conflict were quite limited while Omicron-related effects continued to be confined largely to Asian domestic markets.<sup>4</sup> Hence, international RPKs were down -62.4%, -59.6% and -51.9% in January, February and March respectively compared to the same month in 2019. All regions except for Asia-Pacific showed higher arrival and demand (RPK's) levels than the world average (-61% and -51.9% for March, both over 2019). In both arrival and RPK terms, Africa's recovery is the second slowest and very closely mirrors the world average for both.

International Tourist Arrivals % Change over 2019 for 2020-2022<sup>5</sup>



International Revenue per Kilometer (RPK) % Change over 2019<sup>6</sup>



<sup>1</sup> UNWTO World Tourism Barometer Volume 20, Issue 2, March 2022.

<sup>2</sup> 'Air Travel Sees Strong Demand Recovery in January but Impacted by Omicron', IAATA, 10<sup>th</sup> March 2022.

<sup>3</sup> 'Passenger Recovery Accelerates in February', 6<sup>th</sup> April 2022.

<sup>4</sup> 'Passenger Traffic Recovery Continues in March', IAATA, 4<sup>th</sup> May 2022.

<sup>5</sup> UNWTO Recovery Tracker, <https://www.unwto.org/unwto-tourism-recovery-tracker>.

<sup>6</sup> Air Passenger Market Analysis January-March 2022, IAATA.



# INTERNATIONAL TOURISM PERFORMANCE

# KEY PERFORMANCE INDICATORS

INTERNATIONAL  
TOURIST ARRIVALS



1.0 MILLION

-61.3% ▼

TOTAL FOREIGN  
DIRECT SPEND



ZAR 10.4 BILLION

-59.4% ▼

LENGTH  
OF STAY



12.4 NIGHTS

+11.1% ▲

TOTAL  
BED NIGHTS



12.7 MILLION

-56.6% ▼

GEOGRAPHIC  
SPREAD



11.6%

-4.5%\* ▼

SATISFACTION  
RATING



4.6

+1.0%

\*Change in basis points over Q1 2021.



# SA INTERNATIONAL TOURISM RECOVERY -61.3% ▼

International tourist arrivals in South Africa during the first quarter of 2022 were down by -61.3% compared to Q4 2019 and amounted to 1.0 million tourists thus showing *phenomenal recovery when compared to Q1 2021 (+170.7%)* but still a dramatic decline versus Q1 2019 levels (-61.3%).(according to data collected by Statistics South Africa).

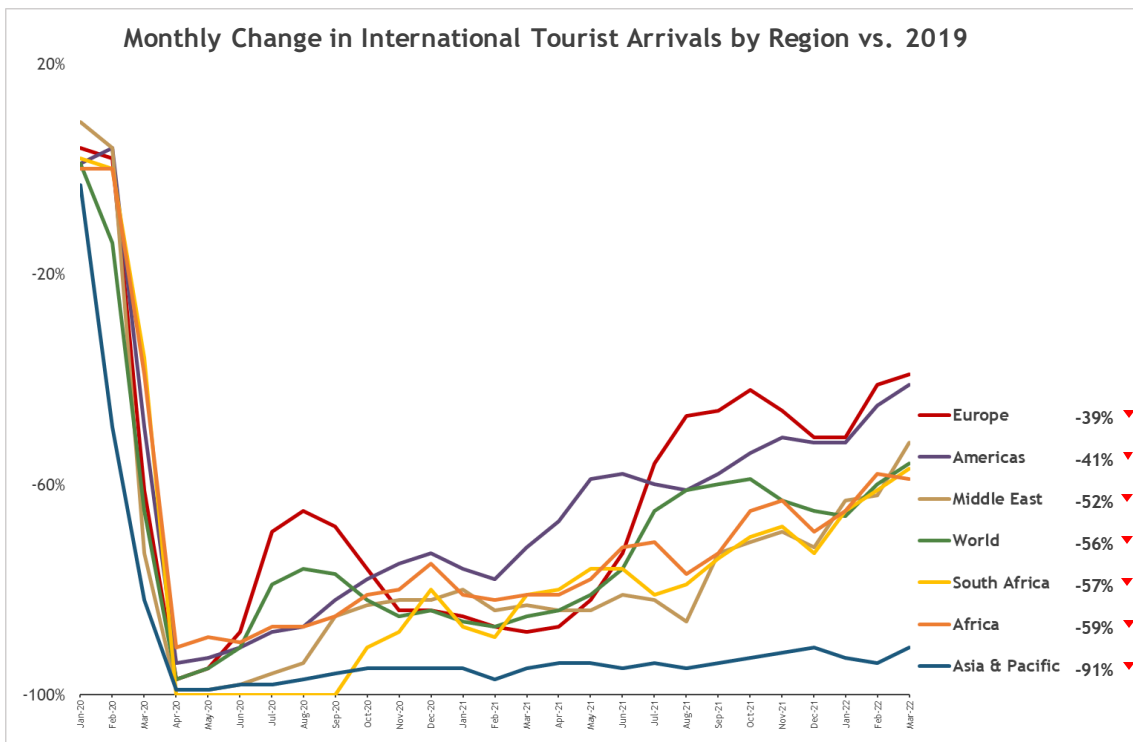
According to the UNWTO, on a monthly basis, international tourist arrivals into South Africa in the first quarter of 2022 were -65%, -61% and -57% in January, February and March when compared to those months in 2019. Clearly then, as the first quarter unfolded, South Africa's recovery improved.

South African arrivals are -61.3% and -57% lower than Q1 & March 2019 respectively.

For Q1 & March 2021, SA arrivals are on par with the rest of Africa, the Middle East as well as the world average.

As may be expected, South Africa's recovery is much better than that of Asia-Pacific and remains on par with the rest of Africa, the Middle East and the world average. It thus continues to be slower than the recovery in Europe and the Americas.

As can be seen in the chart below, the Omicron variant halted Europe's recovery in December 2021 and January 2022. However, as governments internalized Omicron's limited impact, recovery in Europe picked up in February once more only to be slowed down by the Ukrainian conflict in March.<sup>5</sup>



<sup>5</sup> UNWTO Recovery Tracker, <https://www.unwto.org/unwto-tourism-recovery-tracker>.

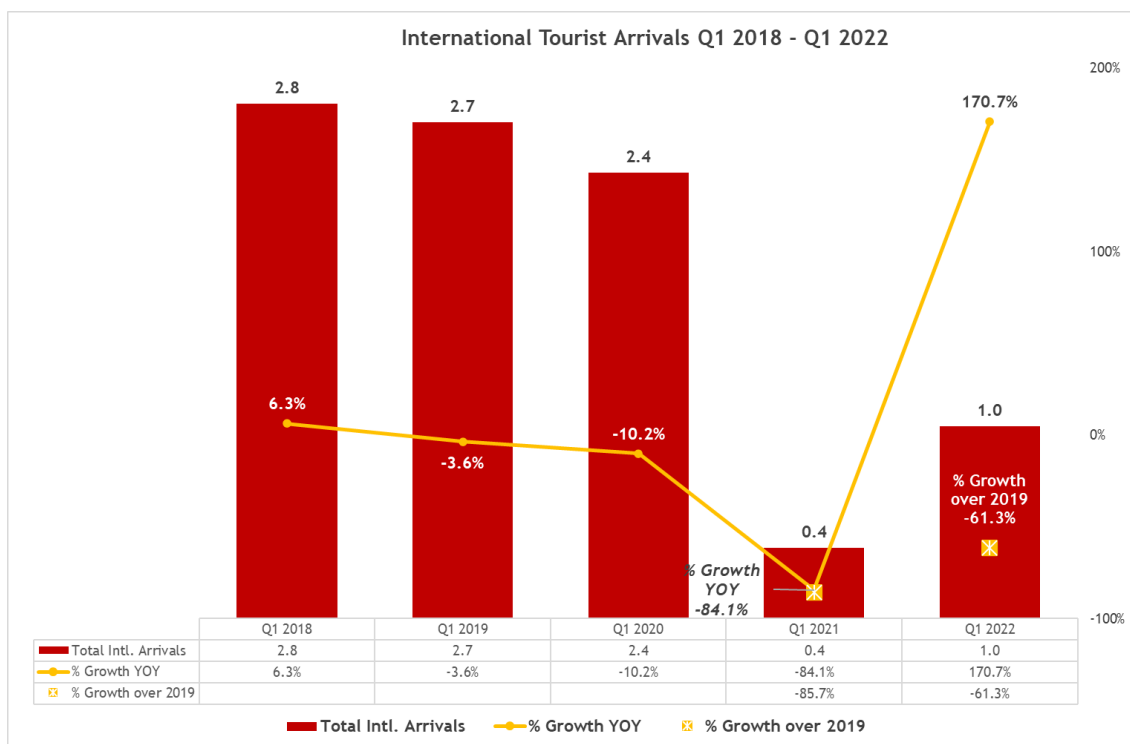
## INTERNATIONAL TOURIST ARRIVALS



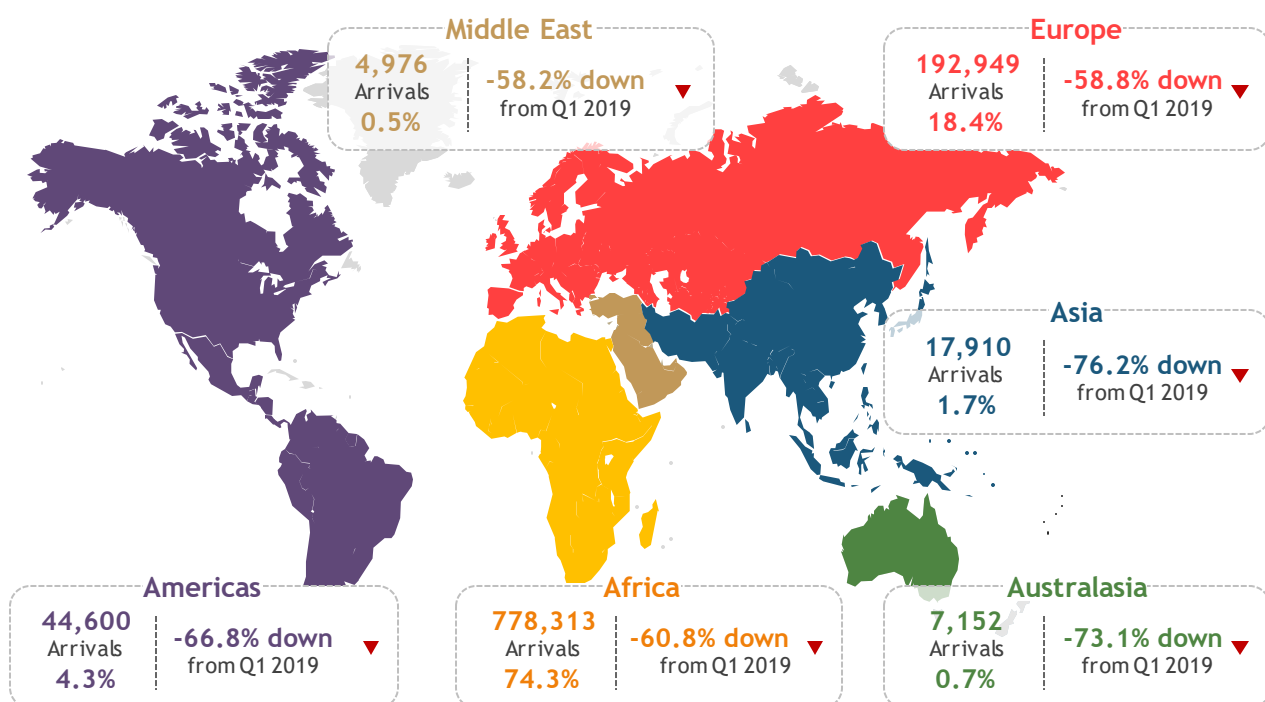
1.0 MILLION

-61.3% ▼

International tourist arrivals to SA during the first quarter of 2022 amounted to 1.0 million tourists thus showing *phenomenal recovery when compared to Q1 2021 (+170.7%)* but still a dramatic decline versus Q1 2019 levels (-61.3%). Africa remains the largest source continent with 74.3% of all international tourist arrivals. Europe maintains its second place (18.4%).



### International Tourist Arrivals Q1 2022 (Actual, Share & Q1 2019 - Q1 2022 Growth)

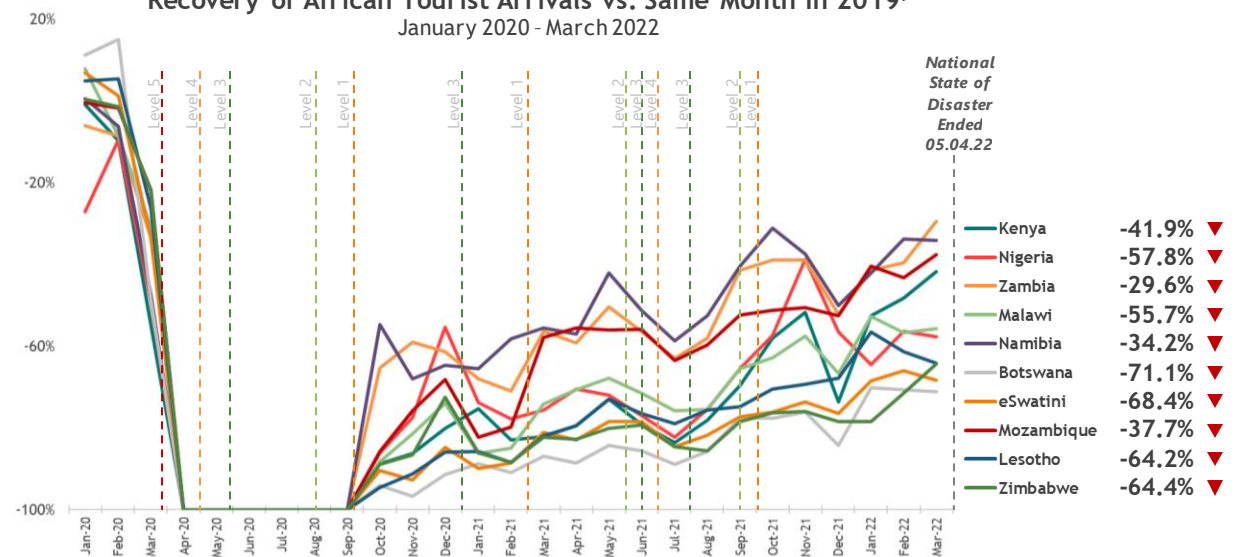


# PRIORITY MARKETS DRIVING AFRICAN RECOVERY

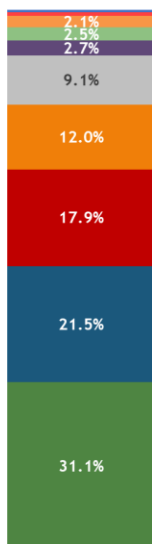
This first quarter, African priority markets' recovery is led by Zambia (-29.6%), Namibia (-34.2%), Mozambique (-37.7%) and Kenya (-41.9%). All four countries are showing decline rates smaller than the -52.5% average as can be seen below. These four countries have therefore increased their share of African arrivals into South Africa with Mozambique showing the greatest share increase. Mozambique now accounts for 26.4% of priority arrivals whereas prior to Covid-19 its share was 17.9%. Zambia and Namibia have almost doubled their share to account now for 3.7% and 4.7% respectively.

Similarly to the previous quarter and as can be seen below, Botswana (-71.1%), eSwatini (-68.4%), Zimbabwe (-64.4%), as well as Lesotho (-64.2%), continue to lead the decline in priority African markets and show the highest drop rates. Consequently, these four countries have also lost significant shares of priority African arrivals. Most bold out of the four, is Zimbabwe's fall from a 31.1% share during pre-Covid-19 times to 25.1% share currently. Lesotho has come down from 21.5% to 19.4%, eSwatini from 12.0% to 10.2% and Botswana from 9.1% to 6.3%.

**Recovery of African Tourist Arrivals vs. Same Month in 2019<sup>7</sup>**  
January 2020 - March 2022



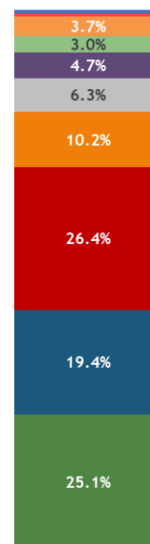
**Pre-Covid Share**



**Share of Priority African Tourist Arrivals by Country Prior vs. During Covid-19<sup>7</sup>**

Pre-Covid Share	Country	Mar-22	
		Share	Recovery
0.4%	Kenya	0.6%	-41.9%
0.7%	Nigeria	0.6%	-57.8%
2.1%	Zambia	3.7%	-29.6%
2.5%	Malawi	3.0%	-55.7%
2.7%	Namibia	4.7%	-34.2%
9.1%	Botswana	6.3%	-71.1%
12.0%	eSwatini	10.2%	-68.4%
17.9%	Mozambique	26.4%	-37.7%
21.5%	Lesotho	19.4%	-64.2%
31.1%	Zimbabwe	25.1%	-64.4%

**Mar-22 Share**



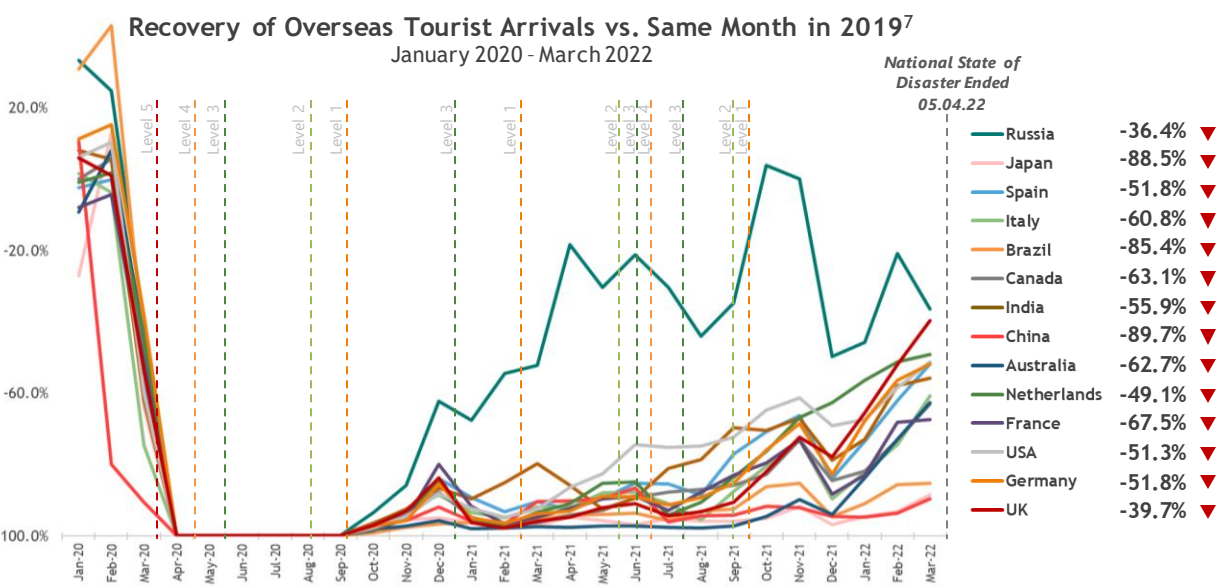
<sup>7</sup> Statistical Release P0351: Tourism and Migration, 1<sup>st</sup> Quarter 2022, Statistics SA.



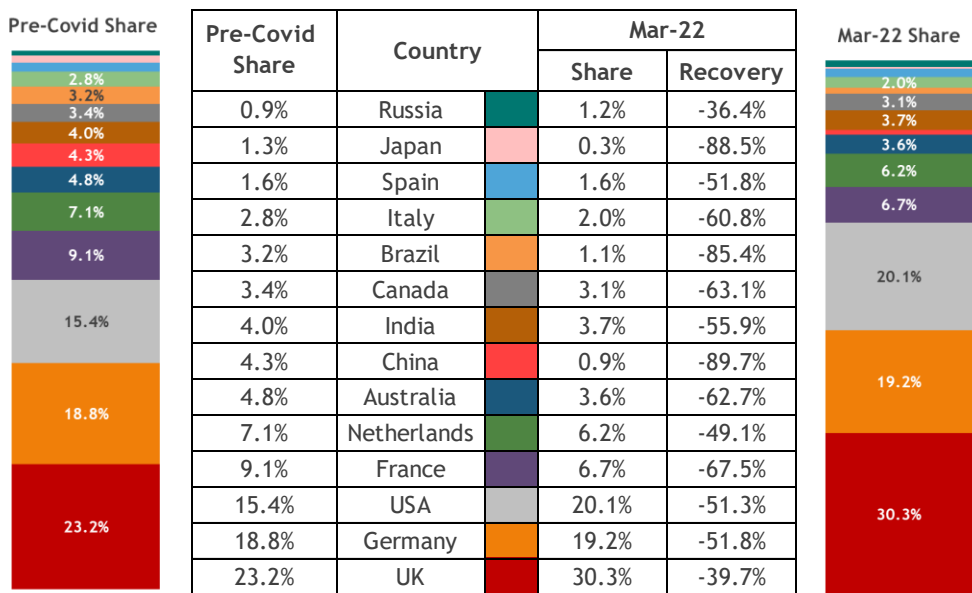
# PRIORITY MARKETS DRIVING OVERSEAS RECOVERY

During the first quarter of 2022, Russia continues to stand apart, showing the highest recovery level of -36.4% over 2019. A marked reversal in Russia's recovery is clear from February onwards and this is due to the Ukrainian conflict. This quarter, Russia is joined by the UK which has been showing a continued and significant recovery since December 2021 to reach -39.7% in March 2022. This recovery has resulted in UK's share amounting to a whopping 30.3% of overseas priority arrivals for March 2022

China, Japan and Brazil continue to lead the losses in overseas priority markets and are joined by France. China and Japan are showing very slight improvement and are now experiencing declines lesser than -90% (-89.7% and -88.5% respectively). Brazil and France are stagnant with -85.4% and -67.5% over 2019. Such decline rates have of course led to dilution of their shares with China now accounting for 0.9% and Japan 0.3% whereas previously their shares were 4.3% and 1.3% respectively.



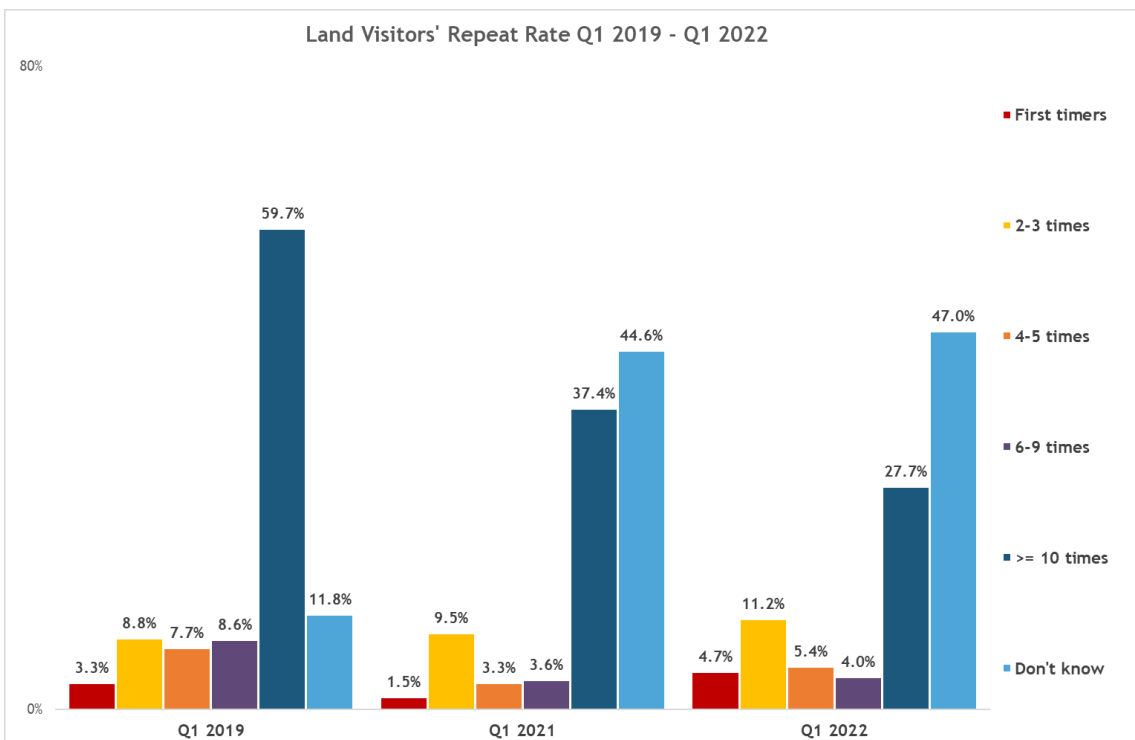
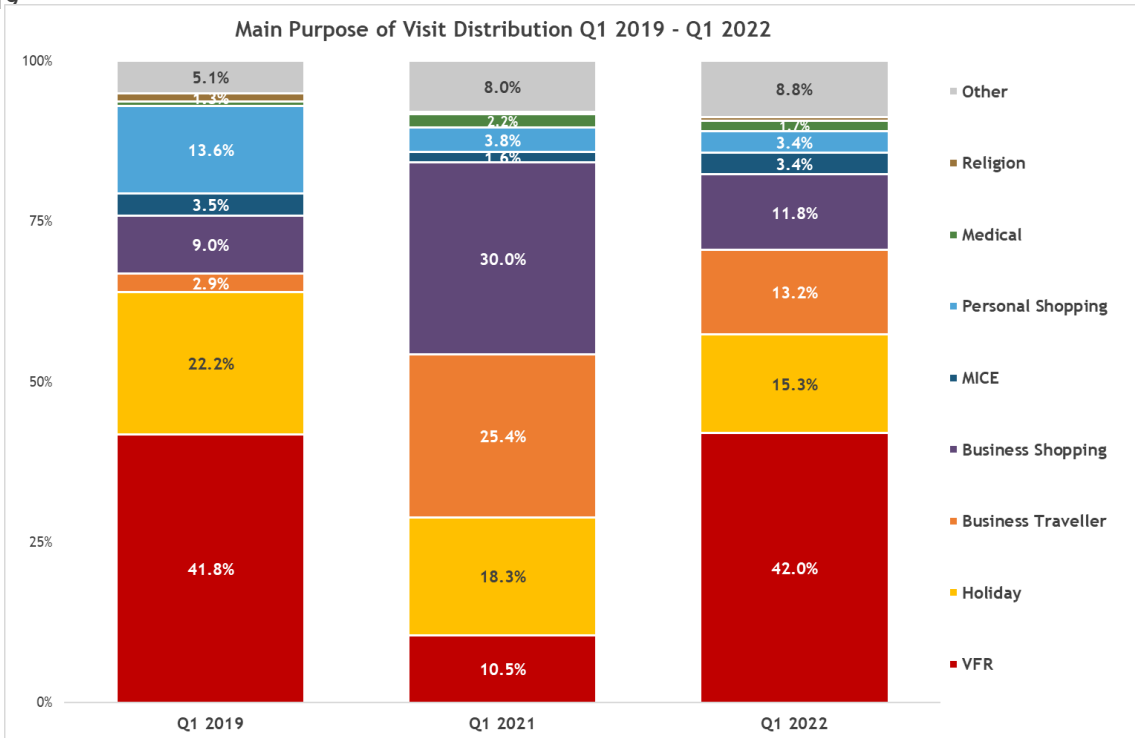
Share of Priority Overseas Tourist Arrivals by Country Prior vs. During Covid-19<sup>7</sup>



<sup>7</sup> Statistical Release P0351: Tourism and Migration, 1<sup>st</sup> Quarter 2022, Statistics SA.

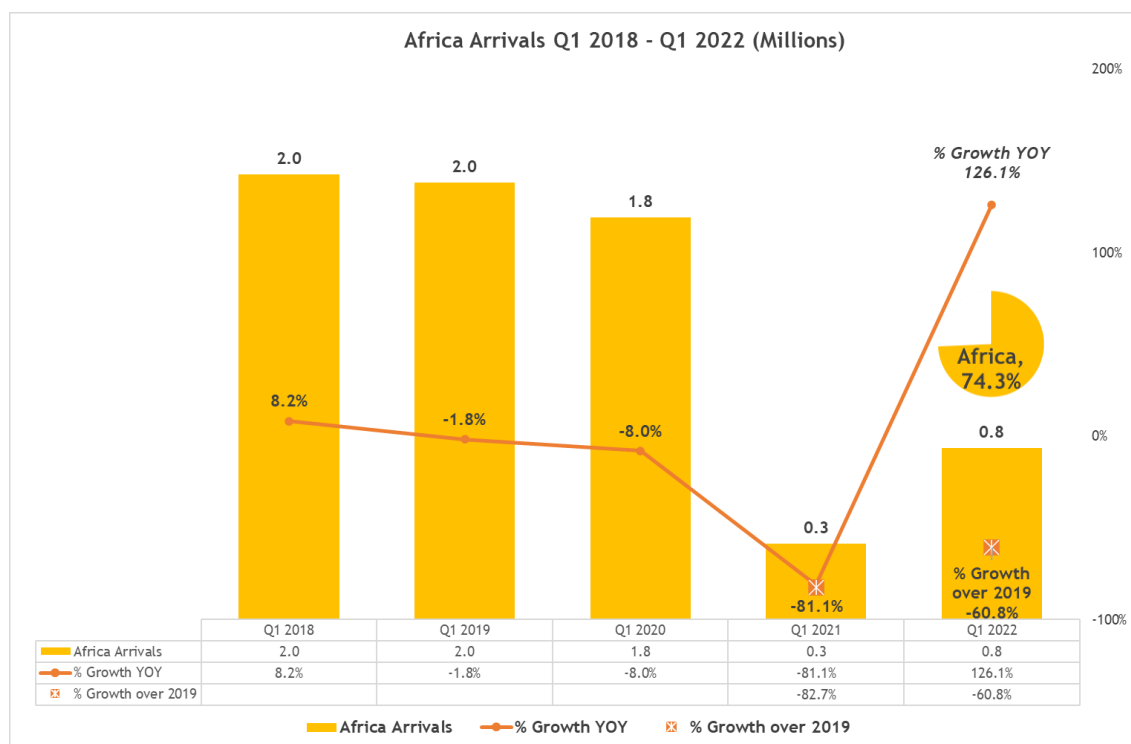
# PURPOSE OF TRAVEL

This first quarter, VFR continues to dominate and has recovered from a low of 10.5% in Q1 2021 to 42.0%, bringing it back to 2019 levels (41.8%). Business Shopping has also returned to 2019 levels with 11.8% share (9.0% in 2019), *shrinking back from its 30.0% in Q1 2021*. Holidays have yet to recover, and their 15.3% share is still far from 22.2% in 2019. Business Travel maintains a larger share (13.2%) than it did in Q1 2019 (2.9%). The deprioritisation of leisure and the restriction of travel to the bare business minimum, are clearly due to Covid-19



# INTERNATIONAL TOURISM – AFRICA ARRIVALS

African tourists accounted for 74.3% of all arrivals in Q1 2022 amounting to 778.3 thousand persons (0.8 million). African tourist arrivals continued to be much lower (-60.8%) than Q1 2019 levels but of course *this is a great improvement when compared to Q1 2021 year-on-year (+126.1%)* or to Q1 2021 decline over Q1 2019 (-82.7%). The Top 10 African source countries list remains similar to that of Q1 2019. Mozambique, Lesotho and Zimbabwe continue to be the Top 3 African origin countries, contributing 72.2% of African tourist arrivals in Q1 2022. This first quarter of 2022, Namibia (-36.7%), Zambia (-37.0%), Mozambique (-40.6%) and Tanzania (-43.4%) show the smallest decline rates. The highest declines rates of around -70.0% over Q1 2019, are evidenced in Zimbabwe, Angola and Botswana. The smallest source countries on the Top Ten list are Malawi, Namibia, Zambia, Angola and Tanzania all with shares smaller than 2.5%.

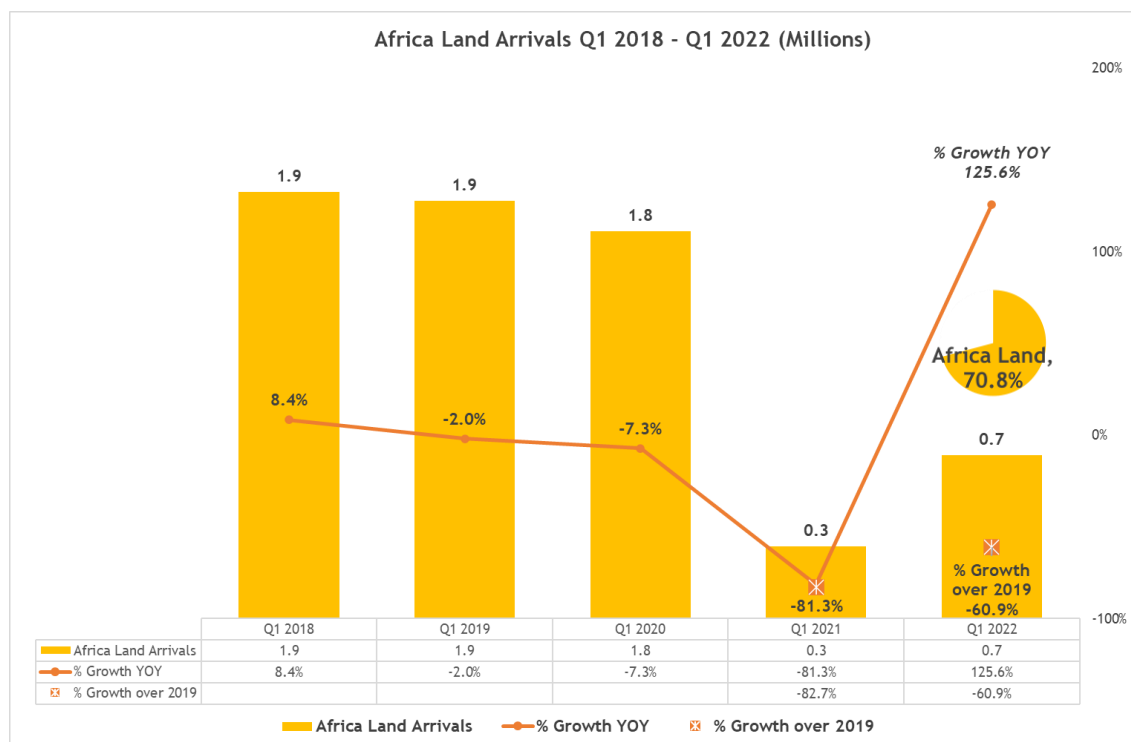


## Africa Tourist Arrivals by Top 10 Markets Q1 2022

Africa Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022, 000's	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Mozambique	219.9	18.6%	28.3%	-40.6%
Lesotho	173.0	21.8%	22.2%	-60.0%
Zimbabwe	169.0	31.3%	21.7%	-72.8%
Eswatini	67.5	10.6%	8.7%	-67.8%
Botswana	38.7	6.7%	5.0%	-70.7%
Namibia	28.5	2.3%	3.7%	-36.7%
Zambia	23.8	1.9%	3.1%	-37.0%
Malawi	21.7	2.4%	2.8%	-55.0%
Angola	5.7	1.0%	0.7%	-71.4%
Tanzania	5.2	0.5%	0.7%	-43.4%
<b>All Africa Arrivals</b>	<b>778.3</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-60.8%</b>

# INTERNATIONAL TOURISM – AFRICA LAND ARRIVALS

Africa Land tourists amounted to 742.0 thousands (0.7 million), and of course continue to account for the overwhelming majority (70.8%) of all tourist arrivals in South Africa, in Q1 2022 as in all others. This is so despite showing dramatically lower levels (-60.9%) than those seen prior to the Covid-19 pandemic although they *are* +125.6% higher than arrivals in Q1 2021. Of course this is the result of a much lower decline rate this quarter (-60.9%) than in Q1 2021 when both are compared to Q1 2019. In other words, this is a great improvement vs. the -82.7% registered in Q1 2021 over Q1 2019. The neighbouring countries of Mozambique, Lesotho and Zimbabwe continue to dominate the source list with Mozambique coming out first again (29.6%), whilst Lesotho (23.3%) and Zimbabwe (22.8%) maintain second and third positions relatively interchangeably due to higher decline rates (-60.0% and -72.8% respectively). Out of all source land markets, Namibia, Zambia and Mozambique have shown the smallest decline rates (-36.7%, -37.0%, -40.6% respectively).



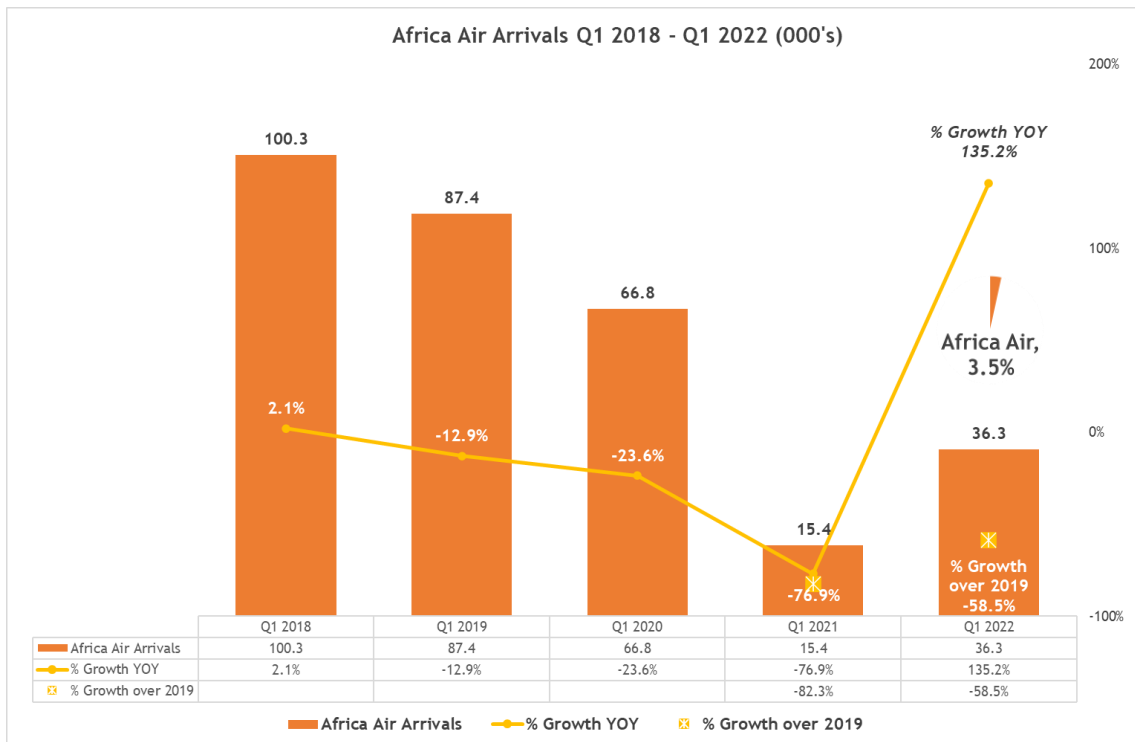
## Africa Land Tourist Arrivals by Market Q1 2022

Africa Land Markets Q1 2022	Tourist Arrivals Q1 2022, 000's	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Mozambique	219.9	19.5%	29.6%	-40.6%
Lesotho	173.0	22.8%	23.3%	-60.0%
Zimbabwe	169.0	32.8%	22.8%	-72.8%
Eswatini	67.5	11.0%	9.1%	-67.8%
Botswana	38.7	7.0%	5.2%	-70.7%
Namibia	28.5	2.4%	3.8%	-36.7%
Zambia	23.8	2.0%	3.2%	-37.0%
Malawi	21.7	2.5%	2.9%	-55.0%
<b>All Africa Land Arrivals</b>	<b>742.0</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-60.9%</b>



# INTERNATIONAL TOURISM — AFRICA AIR ARRIVALS

Africa Air tourists amounted to 36.3 thousand persons, representing 3.5% of all international tourist arrivals in South Africa during Q1 2022. Change rates over Q1 2019 show Africa Air arrivals have declined much less this quarter (-58.5%) when compared to Q1 2021 (-82.3%). Hence, Africa Air arrivals have *more than doubled when compared to Q1 2021* and are just over half of their Q1 2019 levels. Of course, when compared *year-on-year to Q1 2021 the growth is therefore extremely positive (+135.2%)*. The Top Ten source country list has been left relatively unchanged with the exception of Angola which maintains its top position amongst Africa Air markets albeit with a much diluted share (15.7%) when compared to its 2019 counterpart (22.8%). In the same line, Angola as well as Mauritius continue to show the greatest decline rates amongst Africa Air source markets (-71.4% and -66.1% respectively) whilst Tanzania, Ghana, Ethiopia and Kenya show the least declines (-43.4%, -45.5%, -45.5%, -47.4% respectively).

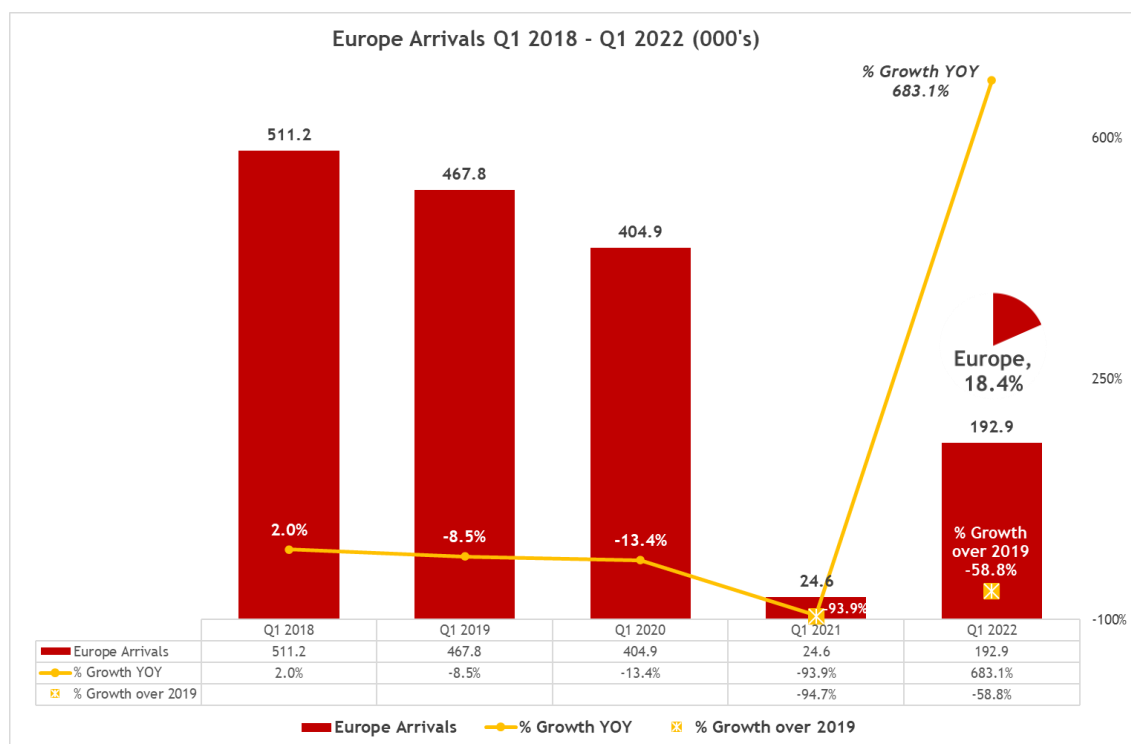


## Africa Air Tourist Arrivals by Top Ten Markets Q1 2022

Africa Air Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Angola	5,690	22.8%	15.7%	-71.4%
Tanzania	5,197	10.5%	14.3%	-43.4%
Nigeria	4,572	13.1%	12.6%	-60.0%
Kenya	3,848	8.4%	10.6%	-47.4%
DRC	3,740	9.1%	10.3%	-53.2%
Ghana	2,667	5.6%	7.3%	-45.5%
Mauritius	1,768	6.0%	4.9%	-66.1%
Uganda	1,748	4.3%	4.8%	-53.4%
Ethiopia	1,047	2.2%	2.9%	-45.5%
Egypt	942	2.8%	2.6%	-61.9%
<b>All Africa Air Arrivals</b>	<b>36,305</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-58.5%</b>

# INTERNATIONAL TOURISM — EUROPE ARRIVALS

This first quarter of 2022, European arrivals amounted to 192.9 thousand and an 18.4% share. European arrivals have recovered considerably this quarter showing a *phenomenal growth over Q1 2021* (+683.1%) and a much lower decline rate (-58.8%) when compared to that of Q1 2021 over Q1 2019 (-94.7%). However, European arrivals remain less than half of levels in Q1 2019. The UK remains the largest European source market with an even greater share of arrivals (34.2%) than prior Covid-19 (29.8%). Next continue to be Germany, the Netherlands and France with respective shares of 22.0%, 9.0% and 7.0%. Despite Russia's remarkable recovery this quarter (-35.2%), it does not feature in the Top Ten list and shares an 11<sup>th</sup> position with Austria as arrivals from both amount to 1.7%. The UK, Ireland and the Netherlands all exhibit the lowest decline rates of around -50.0%. The highest decline rates belong to Sweden (-76.8%), Italy (-72.7%) and France (-72.1%).

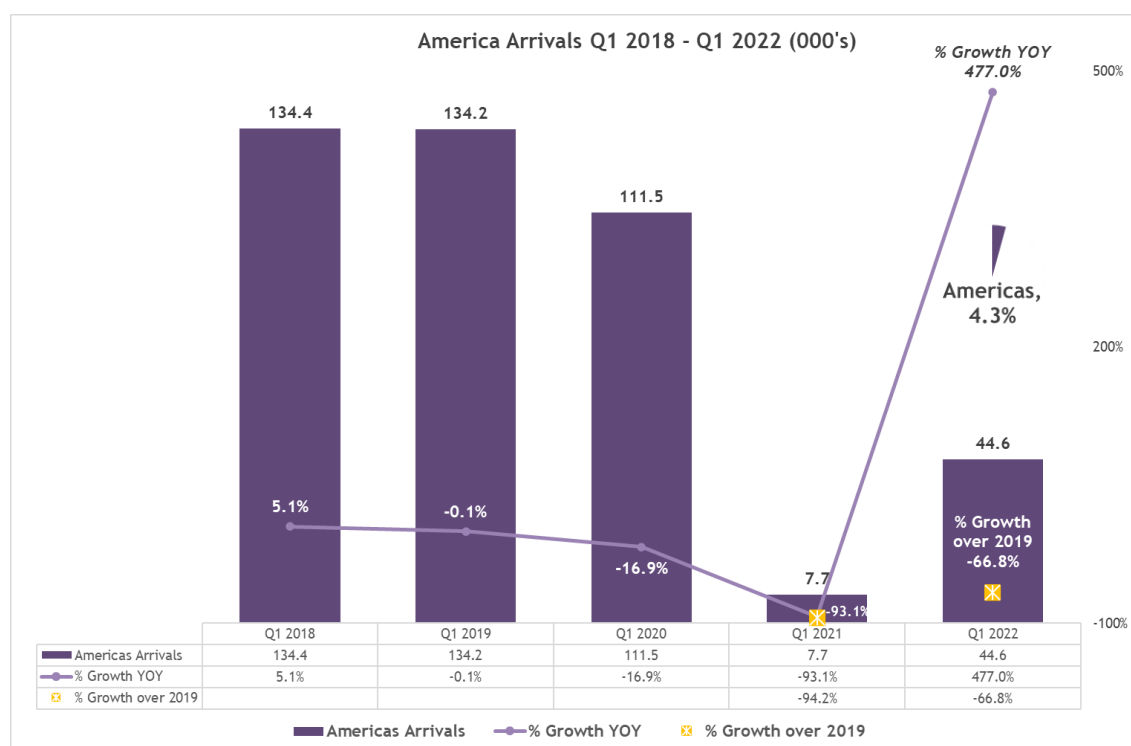


## Europe Tourist Arrivals by Top Ten Markets Q1 2022

Europe Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
UK	65,958	29.8%	34.2%	-52.7%
Germany	42,528	21.8%	22.0%	-58.4%
Netherlands	17,363	7.8%	9.0%	-52.5%
France	13,492	10.3%	7.0%	-72.1%
Switzerland	7,732	3.6%	4.0%	-53.6%
Belgium	5,898	2.8%	3.1%	-54.9%
Ireland	4,448	1.9%	2.3%	-49.6%
Sweden	3,861	3.6%	2.0%	-76.8%
Italy	3,688	2.9%	1.9%	-72.7%
Denmark	3,485	2.0%	1.8%	-62.2%
Others in Top 10 Q1 2019:				
Austria	3,362	2.3%	1.7%	-68.5%
All Europe Arrivals	192,949	100.0%	100.0%	-58.8%

# INTERNATIONAL TOURISM — AMERICAS ARRIVALS

Travel from the Americas showed great recovery this first quarter with an increase of +477.0% over Q1 2021. This translates to a decline of -66.8% rather than the -94.2% registered in Q1 2021 (both over Q1 2019). Despite this remarkable recovery, arrivals from the Americas are still less than half of those of Q1 2019. The USA and Canada continue to top the source country list with the USA strengthening its first position from 62.0% in Q1 2019 to 78.2% this quarter. Travel from South American countries has also begun to recover and especially so from Cuba (-25.6%) and Venezuela (-55.3%). These two have exhibited the lowest decline rates out of all Americas markets. Moreover, the USA's -58.1% is closely matched by Mexico's -58.2%. Consequently, these three South American markets of Cuba, Venezuela, and Mexico, have improved on their Q1 2019 share of Americas arrivals and now amount for 0.5%, 0.3% and 0.8% versus 0.2%, 0.2% and 0.7% in Q1 2019 respectively.



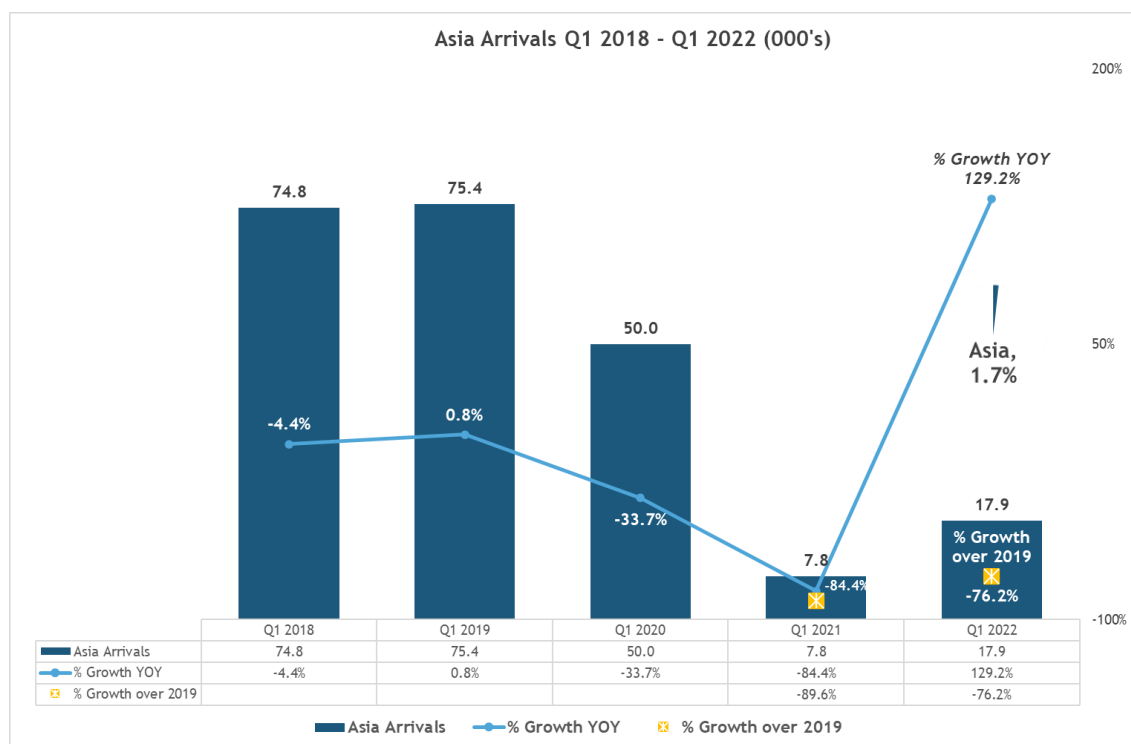
## Americas Tourist Arrivals by Top Ten Markets Q1 2022

Americas Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
USA	34,881	62.0%	78.2%	-58.1%
Canada	5,375	14.3%	12.1%	-72.0%
Brazil	2,212	13.3%	5.0%	-87.6%
Argentina	401	5.6%	0.9%	-94.6%
Mexico	369	0.7%	0.8%	-58.2%
Cuba	232	0.2%	0.5%	-25.6%
Chile	183	1.7%	0.4%	-92.0%
Colombia	121	0.3%	0.3%	-72.8%
Venezuela	115	0.2%	0.3%	-55.3%
Peru	102	0.5%	0.2%	-83.1%
Others in Top 10 Q1 2019:				
Uruguay	54	0.3%	0.1%	-85.4%
<b>All Americas Arrivals</b>	<b>44,600</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-66.8%</b>



# INTERNATIONAL TOURISM — ASIA ARRIVALS

Travel from Asia continues to show the greatest losses (-76.2%) this quarter although this represents an *actual increase when compared year-on-year to Q1 2021 (+129.2%)* and is a smaller decline over Q1 2019 when compared to Q1 2021 (-89.6%). Asia now account for 1.7% of arrivals, this amounting to 17.9 thousand tourists. Hence, Asian arrivals remain less than a quarter than their Q1 2019 levels. As can be expected, the Asian Top Ten list has been much changed by the Covid-19 pandemic with China arrivals dropping by -92.8% and amounting to only 10.3% of arrivals - less than a third than its share in Q1 2019 (34.0%). China has therefore lost its first place to India which now maintains 43.3% of Asia's arrivals. Next in terms of dramatic declines are Japan (-92.2%), S. Korea (-88.3%), Taiwan (-87.2%) and Malaysia (-78.3%). Hence, all of these four have diluted their shares. The greatest recoveries are those of Bangladesh (+12.1%), Pakistan (-29.0%), and the Philippines (-51.4%).

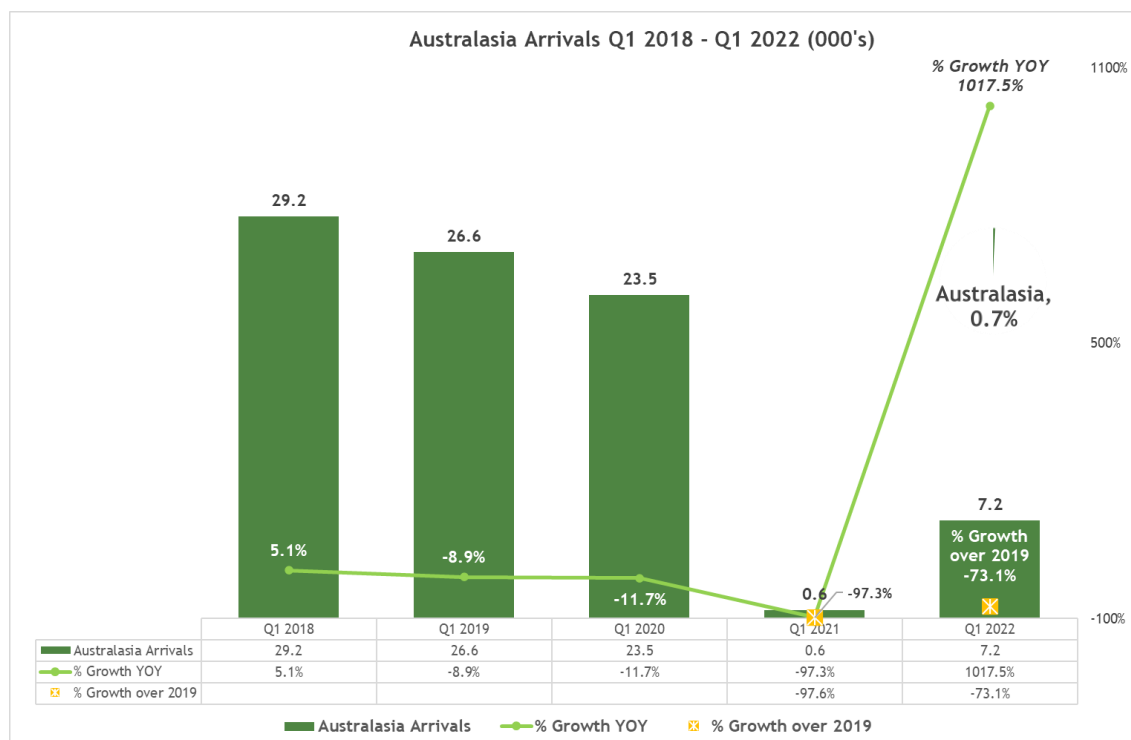


## Asia Tourist Arrivals by Top Ten Markets Q1 2022

Asia Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
India	7,761	27.3%	43.3%	-62.3%
Pakistan	2,655	5.0%	14.8%	-29.0%
China including Hong Kong	1,837	34.0%	10.3%	-92.8%
Bangladesh	1,727	2.0%	9.6%	12.1%
South Korea	804	9.2%	4.5%	-88.3%
Philippines	706	1.9%	3.9%	-51.4%
Japan	542	9.2%	3.0%	-92.2%
Thailand	499	1.9%	2.8%	-66.0%
Malaysia	296	1.9%	1.7%	-79.3%
Taiwan	232	2.4%	1.3%	-87.2%
Others in Top 10 Q1 2019:				
Singapore	135	1.9%	0.8%	-90.7%
<b>All Asia Arrivals</b>	<b>17,910</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-76.2%</b>

# INTERNATIONAL TOURISM – AUSTRALASIA ARRIVALS

Australasian tourist arrivals amounted to 7.2 thousand persons in Q1 2022 and represent only 0.7% of international arrivals to South Africa this quarter. Out of all regions, Australasian arrivals have *recovered the most in comparison to Q1 2021 (+1017.5%)* but still this translates into a decline of -73.1% over Q1 2019. Australasia arrivals are still only about a third of their Q1 2019 levels although this is an improvement on Q1 2021 when Australasian arrivals dropped by -97.3% over Q1 2019. Australia clearly remains the largest source market in the region, accounting for 88.0% of the region's arrivals this quarter. This share is very similar to its share in Q1 2019 (89.3%). Next in line is New Zealand with 11.8% of arrivals which is also very similar to its Q1 2019 share of 10.5%. Arrivals from Australia have declined by -73.5% similarly to those from New Zealand this quarter (-69.8%).

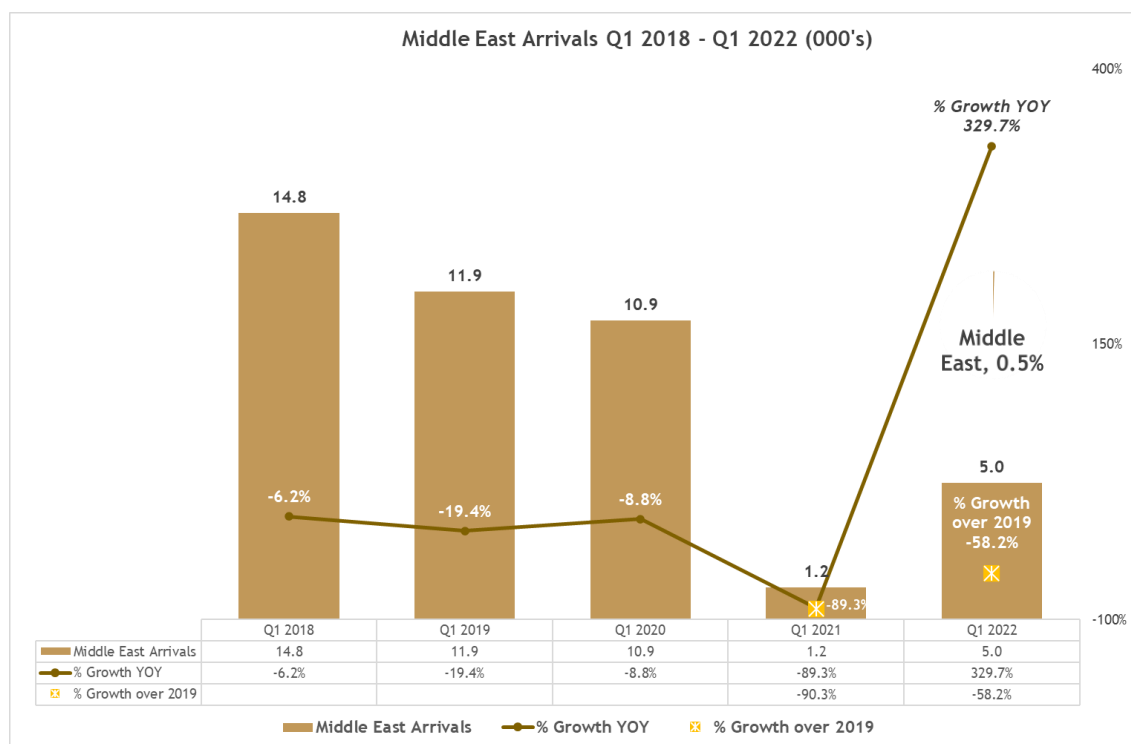


## Australasia Tourist Arrivals by Market Q1 2022

Australasia Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Australia	6,293	89.3%	88.0%	-73.5%
New Zealand	844	10.5%	11.8%	-69.8%
Papua New Guinea	6	0.0%	0.1%	-25.0%
Fiji	3	0.1%	0.0%	-92.1%
<b>All Australasia Arrivals</b>	<b>7,152</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-73.1%</b>

# INTERNATIONAL TOURISM — MIDDLE EAST ARRIVALS

International tourist arrivals from the Middle East during the first quarter represent 0.5% or 5.0 thousand tourists in person. This *considerable growth of +329.7% vs. Q1 2021* amounts to a decline of -58.2% over Q1 2019. Of course, like in all other regions, this is a bold recovery also when compared to its Q1 2021 drop over Q1 2019 (-90.3%). However, Middle East arrivals still remain less than half of Q1 2019 levels. Israel maintains its first place with a 52.7% share which compares well to the 56.6% held in Q1 2019. Next in line are Saudi Arabia with 14.9% and Iran with 9.2% -- both of these slightly strengthened since Q1 2019. Shares of all other markets remain shares relatively similar to those of Q1 2019 except for Iraq which has lost its place in the list due to a -90.6% decline over Q1 2019. In terms of growth rates, Qatar has shown the smallest decline over Q1 2019 (-7.4%). The UAE and Iran have also declined by fairly low rates when compared with the rest (-33.6% & -40.6% respectively).



## Middle East Tourist Arrivals by Top Ten Markets Q1 2022

Middle East Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Israel	2,620	56.6%	52.7%	-61.1%
Saudi Arabia	742	12.0%	14.9%	-48.1%
Iran	456	6.4%	9.2%	-40.6%
Lebanon	342	7.0%	6.9%	-58.9%
Jordan	269	6.2%	5.4%	-63.6%
United Arab Emirates	192	2.4%	3.9%	-33.6%
Qatar	125	1.1%	2.5%	-7.4%
Yemen	68	1.4%	1.4%	-60.2%
Syria	61	1.5%	1.2%	-66.5%
Kuwait	47	1.5%	0.9%	-73.1%
Others in Top 10 Q1 2019:				
Iraq	15	1.3%	0.3%	-90.6%
<b>All Middle East Arrivals</b>	<b>4,976</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-58.2%</b>



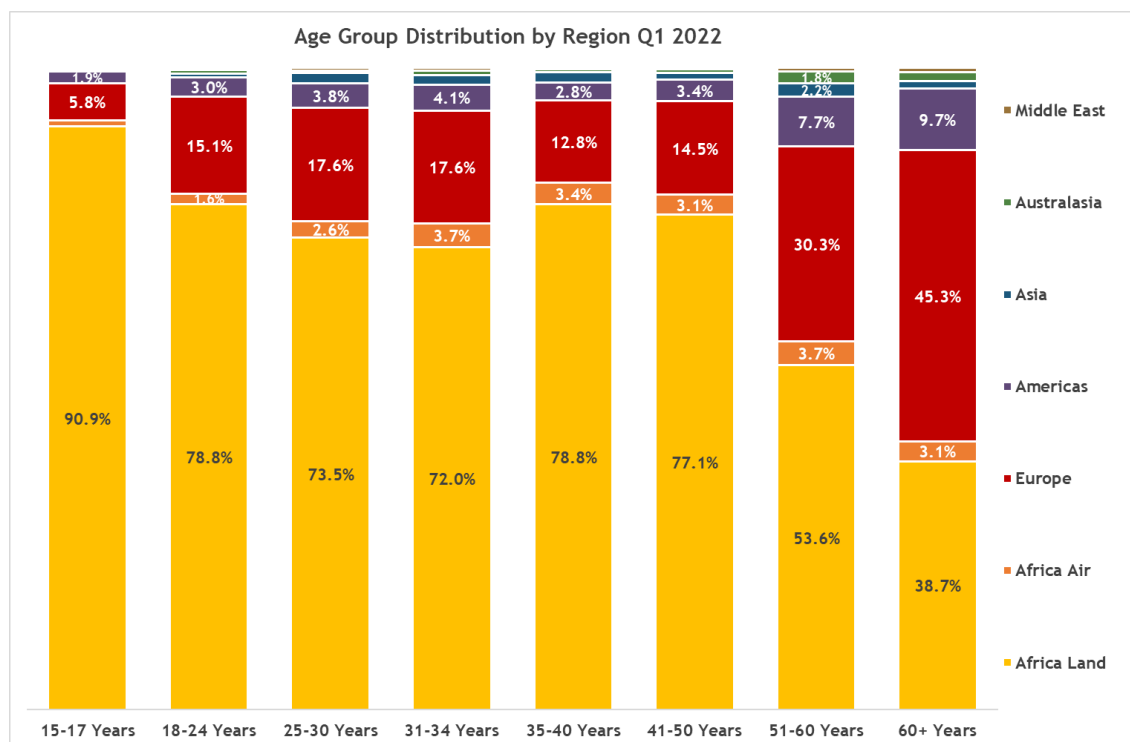
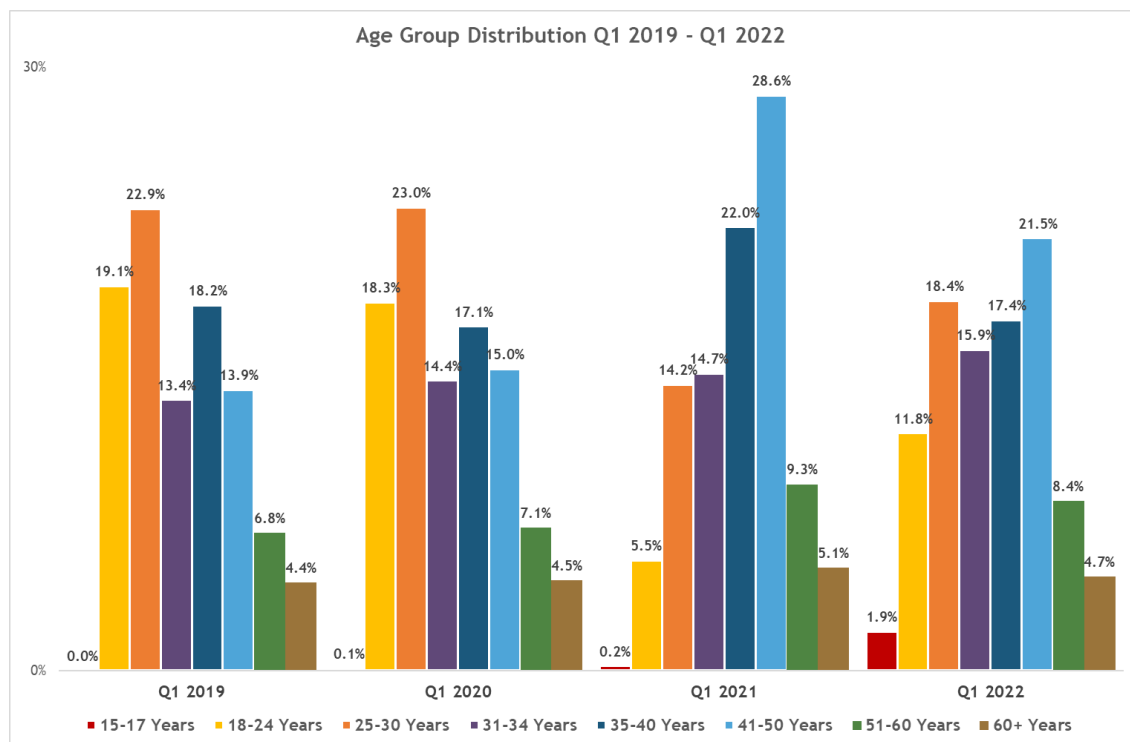
## INTERNATIONAL TOURIST ARRIVALS



1.0 MILLION

-61.3%

During the first quarter of 2022, Covid-19's impact on travel patterns seems to have dissipated considerably with travellers more evenly distributed across age groups. Most notable, is the reduction in 35-50 year-olds as VFR leisure travel comes back to the fore whilst Business Travel *has shrunk considerably from its height in 2021*. Regional patterns remain as in the past, with African travellers being the youngest group out of all regions.



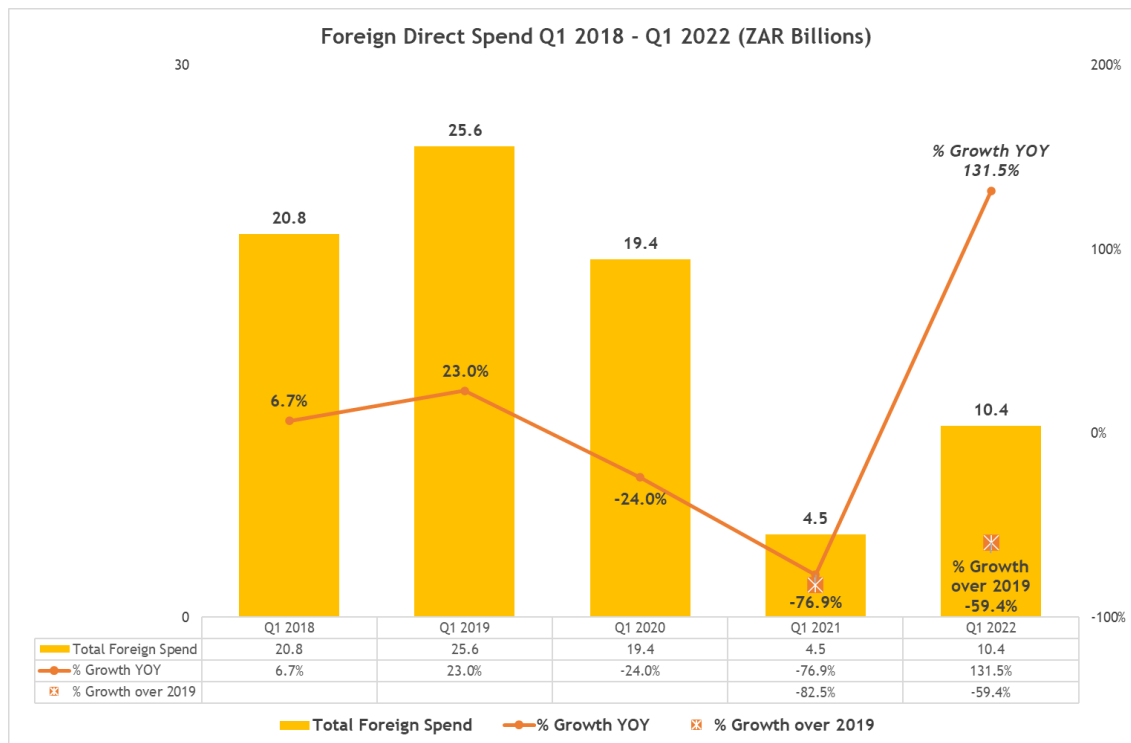
## TOTAL FOREIGN DIRECT SPEND



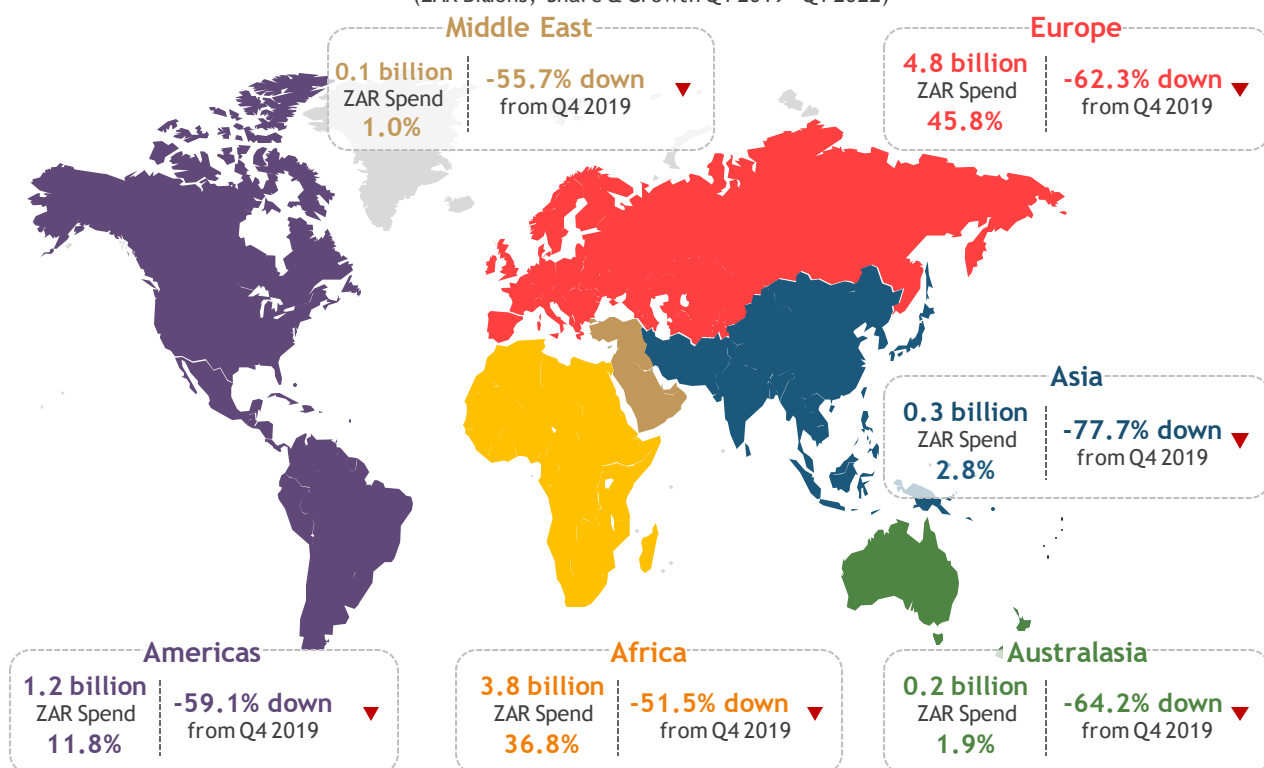
**ZAR 10.4 BILLION**

**-59.4%** ▼

Spend by international tourists has recovered this first quarter falling by only -59.4% vs. 2019 and not by as much as -82.5% as it did in Q1 2021. Hence, spend is showing growth of +131.5% over Q1 2021. Total foreign direct spend now equals ZAR 10.4 billion.



## Foreign Direct Spend by Region Q1 2022 (ZAR Billions, Share & Growth Q1 2019 - Q1 2022)



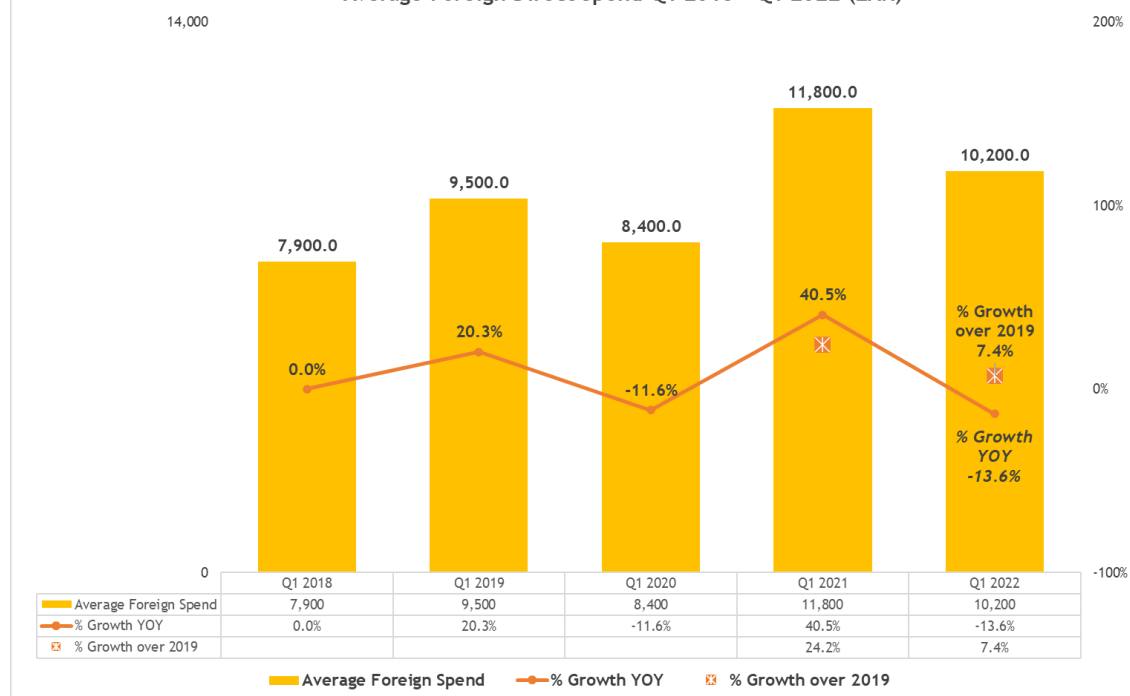


Regional performance shows that negative growth in spend has been the greatest amongst Asian and South American tourists with decline rates in the range of -78% to -80%. Asia's share of spend has been therefore almost halved from 5.1% in Q1 2019 to 2.8% in Q1 2022. African tourists' spend has been the least to decline with growth rates ranging from -48.1% for Africa Air and -52.2% for Africa Land, with -51.5% for Africa as a whole. Hence, Africa's share of spend has increased by +6% points since Q1 2019 and now stands on 36.8%. On the other hand, Europe's share has declined by -3.5% since Q1 2019 and now equals 45.8%. Americas' spend has declined in line with the overall average (-59.1%) so much so that Americas' share has remained exactly the same as was the case in Q1 2019 (11.8%).

### Foreign Direct Spend by Region Q1 2019 & Q1 2022

Region	Spend (ZAR Billions)		% Share		% Growth Q1 2019 - Q1 2022
	Q1 2019	Q1 2022	Q1 2019	Q1 2022	
Africa	7.9	3.8	30.8%	36.8%	-51.5%
Africa Land	6.5	3.1	25.4%	29.9%	-52.2%
Africa Air	1.4	0.7	5.4%	6.9%	-48.1%
Europe	12.6	4.8	49.3%	45.8%	-62.3%
Americas	3.0	1.2	11.8%	11.8%	-59.1%
North America	2.4	1.1	9.6%	10.8%	-54.3%
Central & S. America	0.6	0.1	2.2%	1.1%	-79.9%
Asia	1.3	0.3	5.1%	2.8%	-77.7%
Australasia	0.5	0.2	2.1%	1.9%	-64.2%
Middle East	0.2	0.1	0.9%	1.0%	-55.7%
All Arrivals	25.6	10.4	100.0%	100.0%	-59.4%

### Average Foreign Direct Spend Q1 2018 - Q1 2022 (ZAR)





Average foreign spend has increased by +7.4% over Q1 2019 but has *decreased over Q1 2021* by -13.6% when average spend reached a peak of ZAR 11,800. Clearly, *the reduction over the previous year (Q1 2021)* is due to the relaxation of Covid-19 travel regulations and the ability to travel more freely and without quarantine. Regional averages differ greatly. Africa has increased its average spend by +22.5% to +23.7% whilst Europe's has declined by -13.7%. Central and South American average spend has gone up by +68.7% over 2019.

## Average Foreign Direct Spend by Region Q1 2019- Q1 2022

Region	Average Spend (ZAR)				% Growth
	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2019 - Q1 2022
Africa	4,000	4,400	9,700	4,900	22.5%
Africa Land	3,400	3,900	9,500	4,200	23.5%
Africa Air	19,000	21,000	21,600	23,500	23.7%
Europe	30,000	21,600	21,100	25,900	-13.7%
Americas	24,900	22,300	22,400	29,700	19.3%
North America	26,500	23,500	23,400	29,400	10.9%
Central & S. America	19,800	19,000	18,900	33,400	68.7%
Asia	19,600	20,100	22,900	21,200	8.2%
Australasia	22,300	22,100	21,600	28,000	25.6%
Middle East	23,000	20,700	16,800	26,800	16.5%
All Arrivals	9,500	8,400	11,800	10,200	7.4%

Expenditure has declined this quarter in all categories substantially except for Medical. Whilst Medical expenses went down by only -14.4%, and Personal Shopping by -51.9%, all other categories went down by -59.3% or more. Medical expenses have come off such a small base, that although their share has doubled from 1.1% to 2.2% (Q1 2019 to Q1 2022), it is still of course very small. On the other hand, Personal Shopping, has grown from 23.7% to 30.1% (Q1 2019 to Q1 2021). Food has kept a 21% share whilst all other expenditure shares have gone down most notably Accommodation losing 4.5% points.

## Foreign Direct Spend by Type Q1 2019- Q1 2022

Spend Category	ZAR Billions		% Share		% Growth
	Q1 2019	Q1 2022	Q1 2019	Q1 2022	Q1 2019 - Q1 2022
Personal Shopping	6.1	3.1	23.7%	30.1%	-51.9%
Food	5.6	2.2	21.8%	21.2%	-60.5%
Accommodation	4.6	1.4	18.2%	13.7%	-74.1%
Other	2.8	1.1	11.0%	11.0%	-59.3%
Transport	3.2	1.0	12.6%	9.5%	-69.2%
Leisure	3.2	0.9	12.5%	8.9%	-71.3%
Business Shopping	1.7	0.4	6.6%	3.4%	-79.0%
Medical	0.3	0.2	1.1%	2.2%	-14.4%
All Foreign Spend	25.6	10.4	100.0%	100.0%	-59.4%



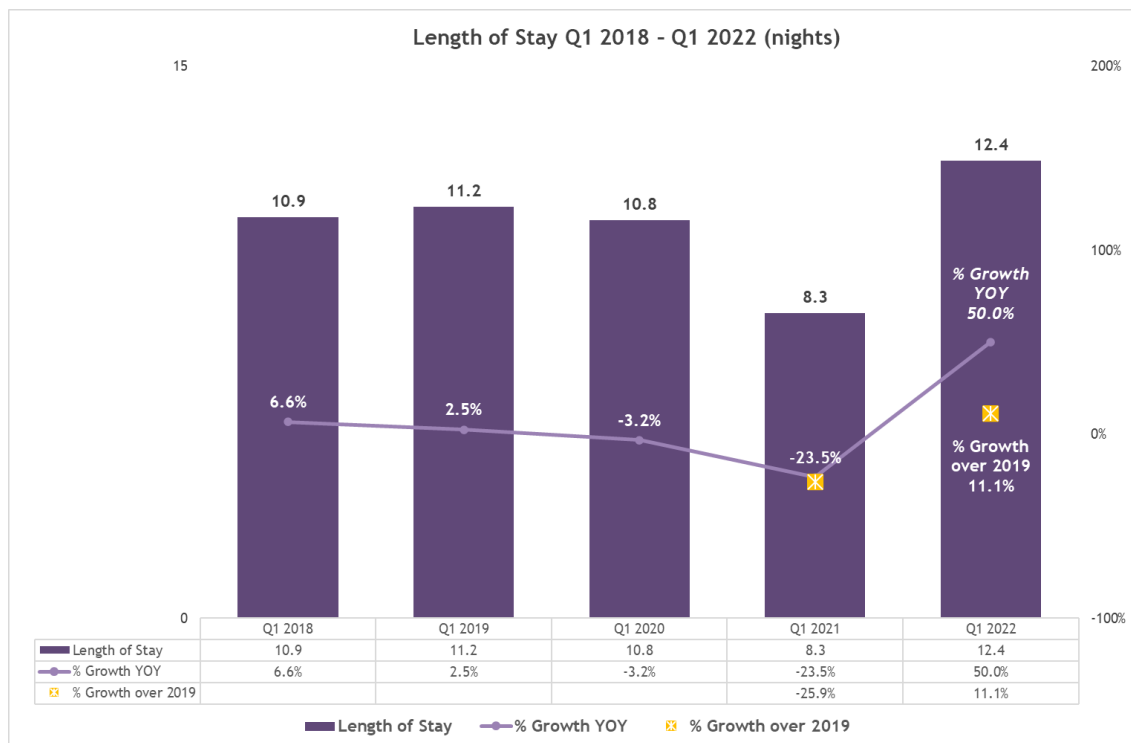
## LENGTH OF STAY



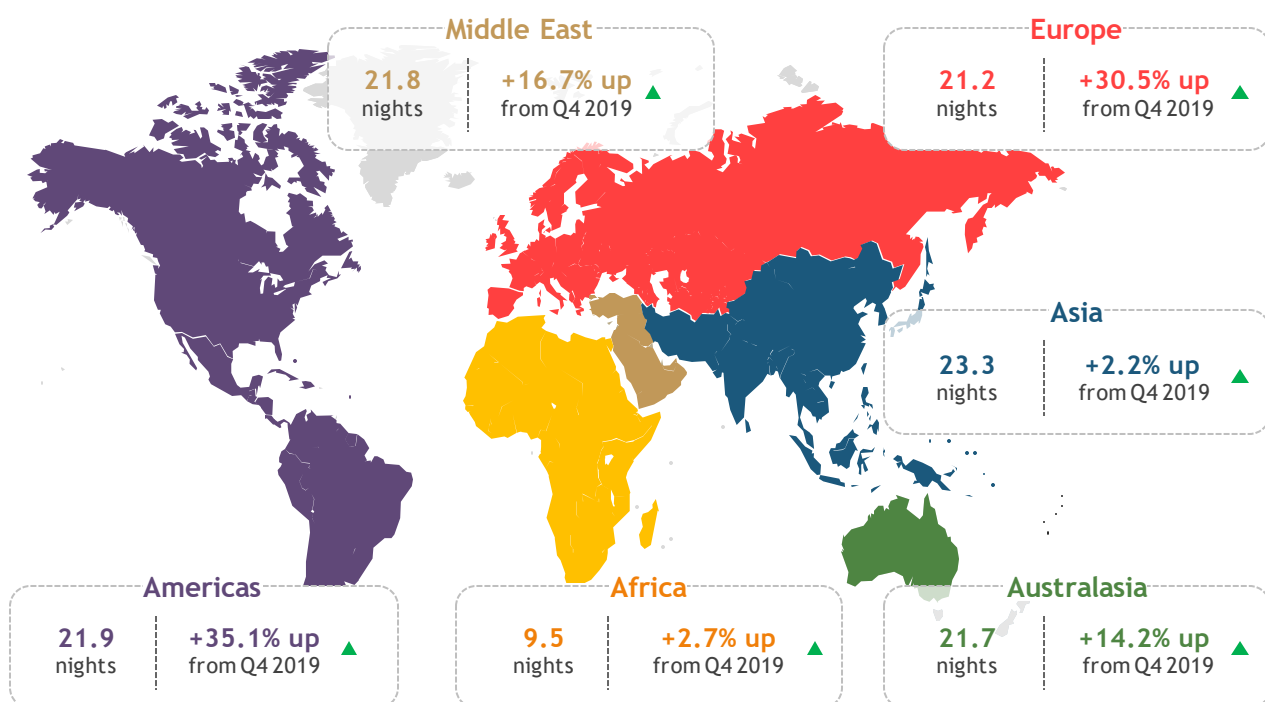
# 12.4 NIGHTS

+11.1% ▲

Length of stay in Q1 2022 has gone up by +11.1% over Q1 2019 and by +50.0% over Q1 2021. Length of stay now totals 12.4 nights. A similar result of 12.5 nights was achieved only in Q1 2017. This result marks a more than complete recovery and return to pre-Covid-19 levels where Length of stay averaged around 11.0 nights.



## Length of Stay Q1 2022 (Bed Nights & Growth Q1 2019 - Q1 2022)



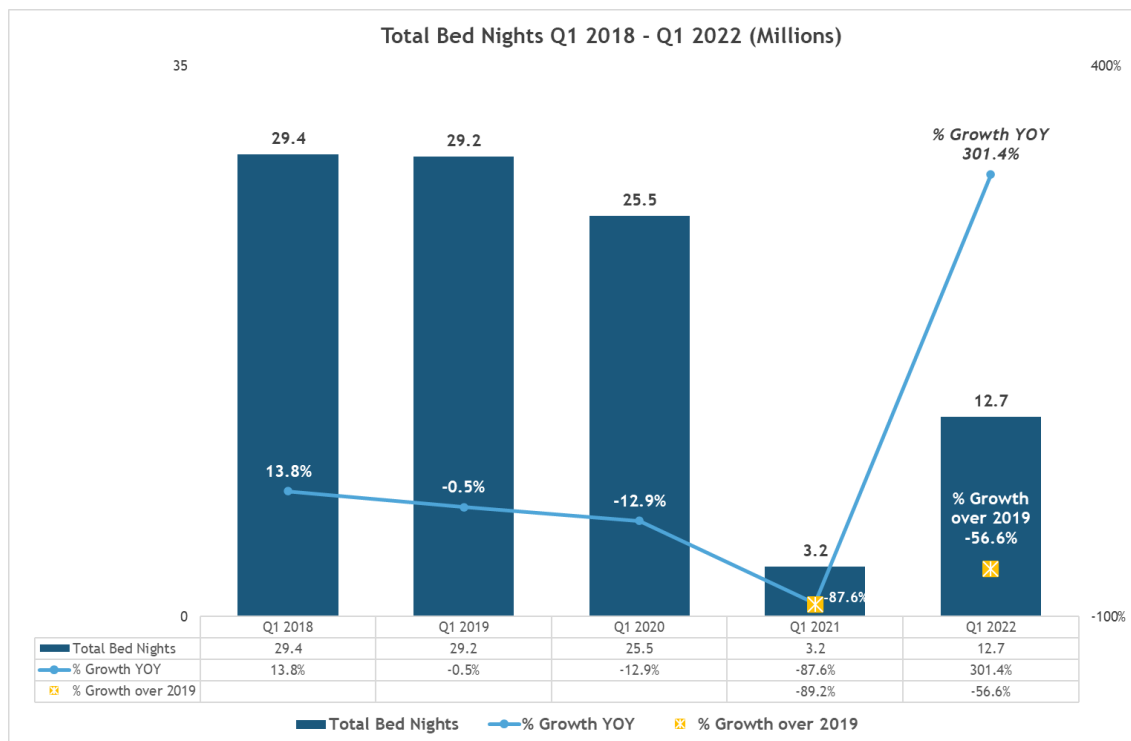
## TOTAL BED NIGHTS



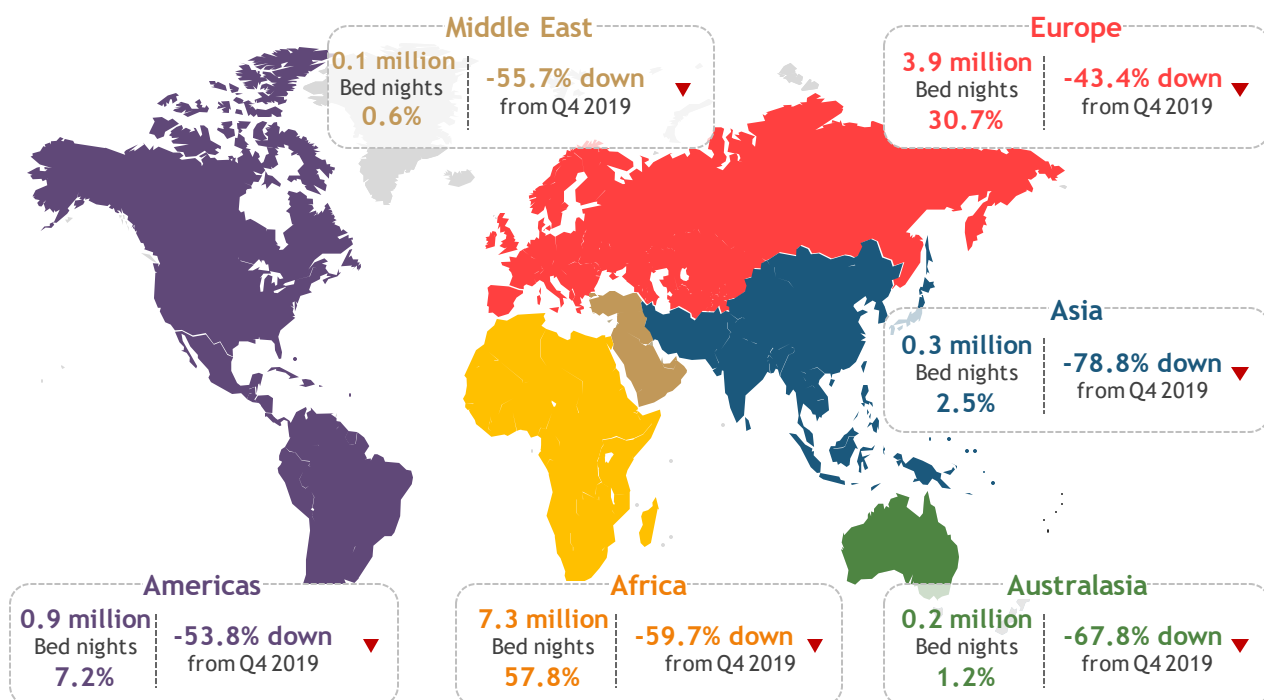
12.7 MILLION

-56.6% ▼

In line with length of stay, bed nights have also recovered but not to Q1 2019 levels. Total bed nights amounted to 12.7 million, this being a -56.6% decline over Q1 2019 but a *remarkable +301.4% over Q1 2021*. In terms of regions, Europe was the most to recover, and Asia the least, with bed nights falling respectively by -43.4% and -78.8% over Q1 2019.



## Total Bed Nights Q1 2022 (Millions, Share & Growth Q1 2019 - Q1 2022)

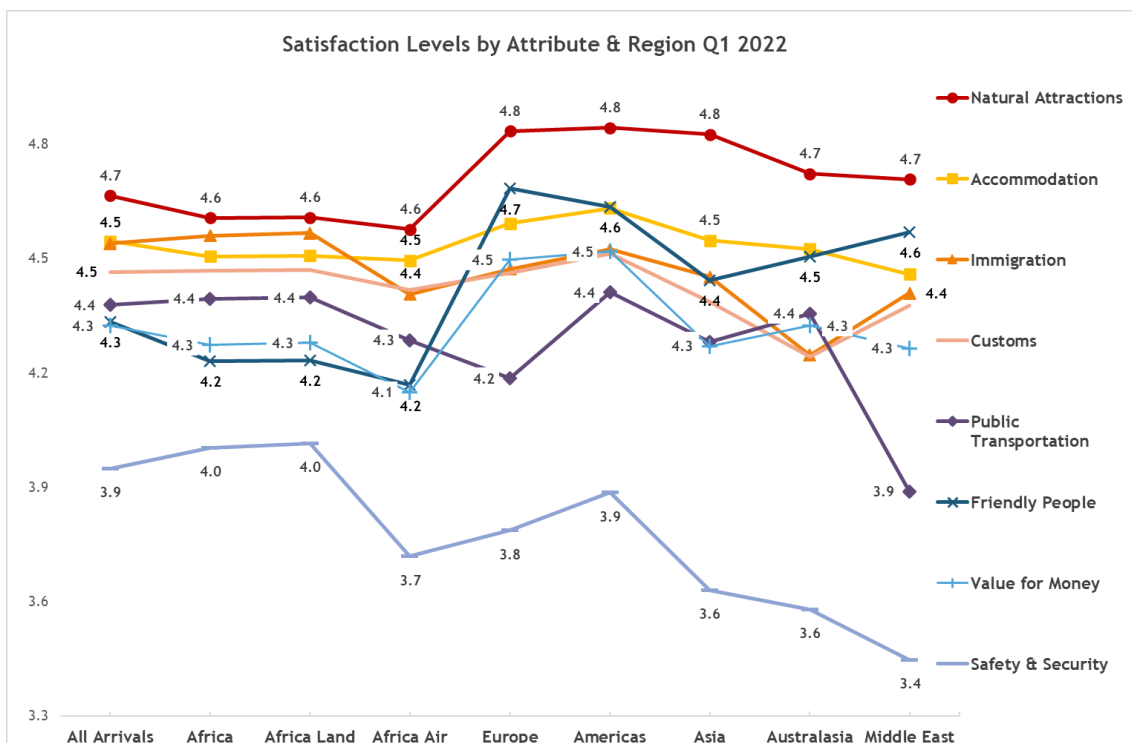
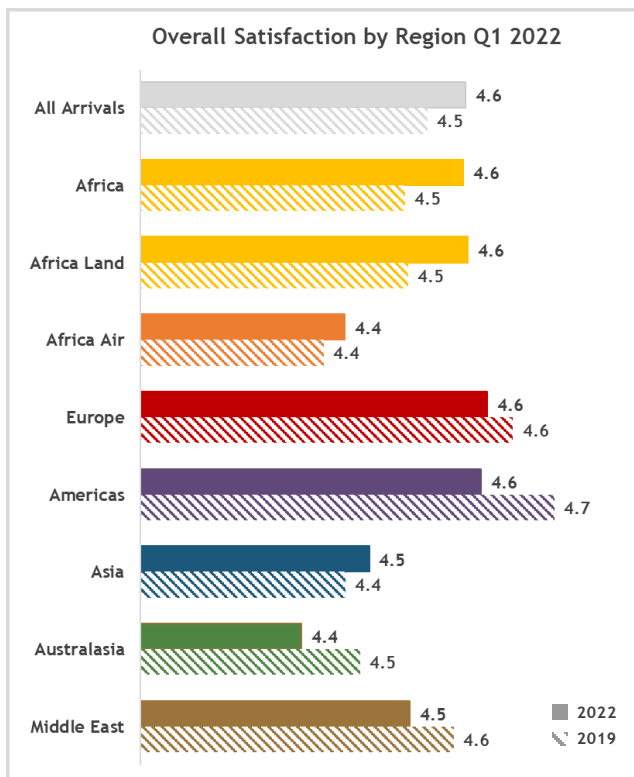




International tourists' satisfaction with South Africa has improved overall this quarter and is now 4.6 out of a maximum score of 5. Higher satisfaction levels are driven by both Land and Air African tourists. Asia tourists' satisfaction has also gone up but being given their very small share of arrivals, their impact is extremely limited.

All other regions are showing lower satisfaction levels. Most significant amongst these are falls in satisfaction levels for the Americas (-0.9), Australia (-0.7) as well as the Middle East (-0.5). The question remains whether these lower levels of satisfaction are temporarily due to Covid-19 or whether they are due to other circumstances at play.

Satisfaction levels by parameters continue to show great appreciation for South African natural attractions as well as accommodation solutions. Satisfaction levels for these two attributes, as well as Customs & Immigration, are fairly consistent across all regions. However, evaluations differ vastly regarding Safety & Security, the Friendliness of its people, Public Transportation as well as Value for Money. Whereas Americas and European travellers perceive SA's people as very friendly (4.6-4.7), African tourists think so to a much lesser extent (3.7-4.0).





# INTERNATIONAL TOURISM: PROVINCIAL PERFORMANCE



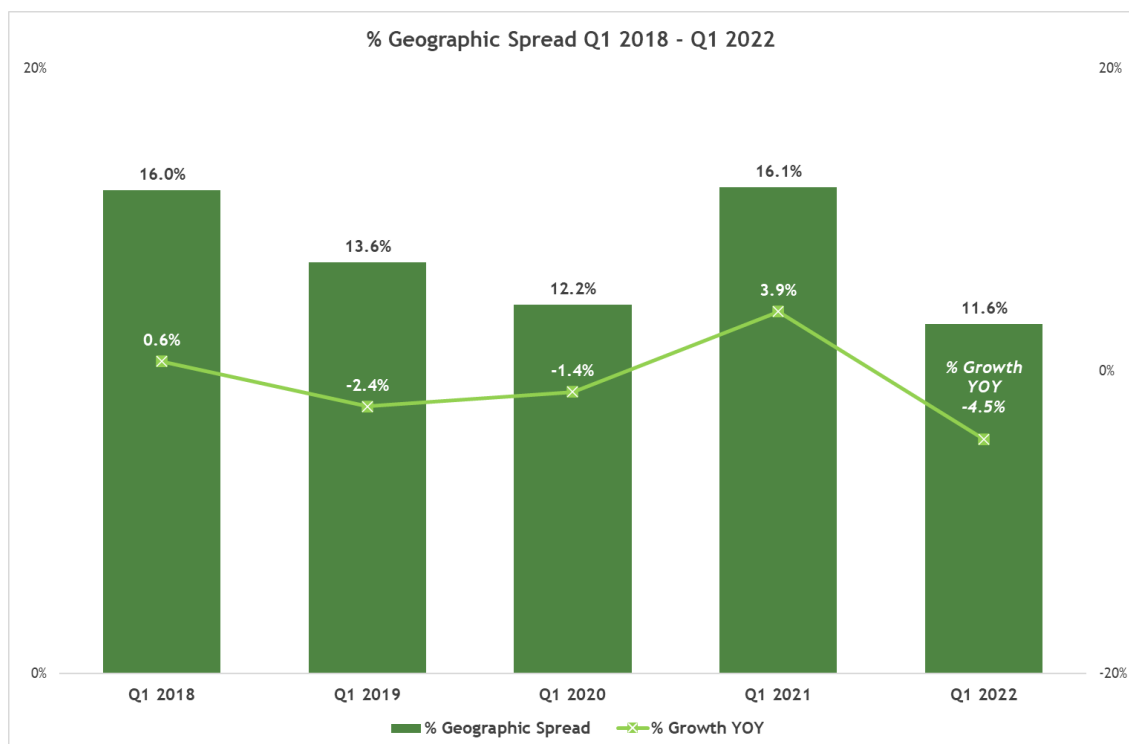
## GEOGRAPHIC SPREAD



11.6%

-4.5%\*

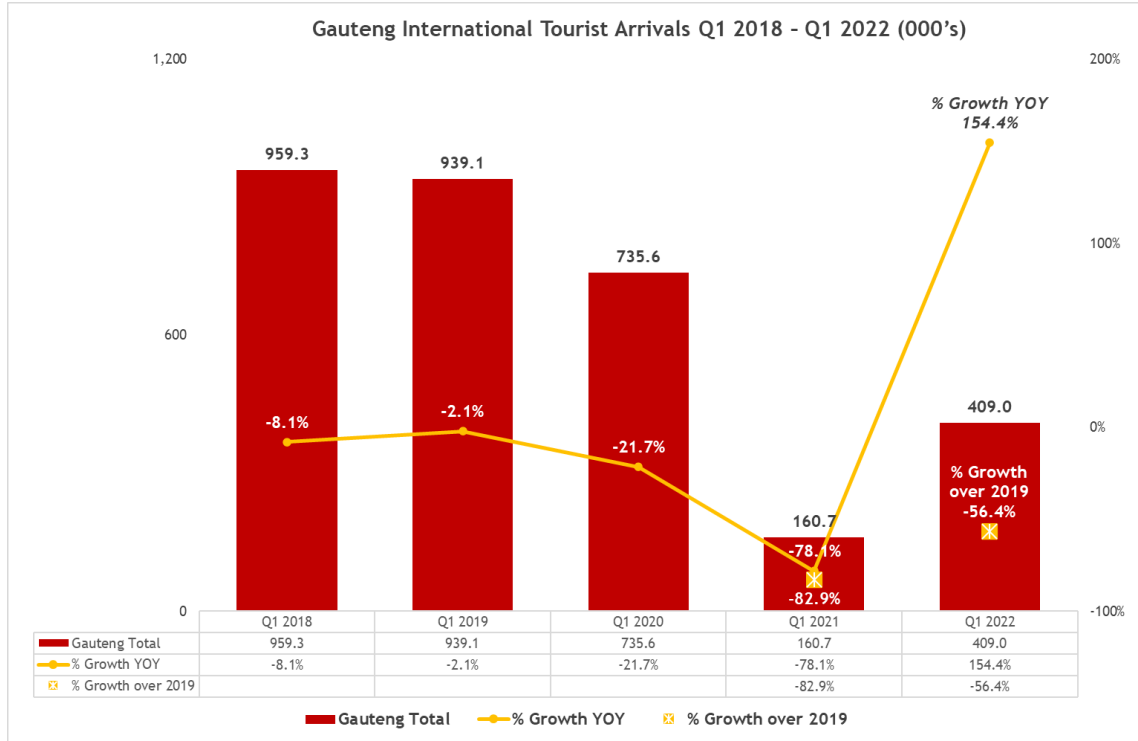
South Africa's geographic spread index (the share of tourists that travel to two or more provinces) has gone down this first quarter to 11.6%, representing a -4.5% basis point change from the first quarter of 2021. The longest length of stay was recorded in two out of the three Cape provinces namely, the Western and Eastern Cape, each with a minimum of 16 nights. Most other provinces are close to the overall average 12.4 nights' stay, with the exception of the North West (9.7 nights) and the Northern Cape (5.2) nights.



## Tourist Arrivals, Spend, Bed Nights & Length of Stay by Province Q1 2022

Province	International Tourist Arrivals (000's)	Foreign Spend (ZAR Billions)	Bednights (Millions)	Length of Stay (Nights)
Gauteng	409,008	3.6	4.5	11.4
Mpumalanga	240,716	1.0	1.4	5.9
Western Cape	174,488	3.3	2.8	16.2
KwaZulu-Natal	116,911	0.8	1.3	11.1
Free State	113,278	0.3	1.2	11.1
North West	48,536	0.2	0.5	9.7
Limpopo	39,006	0.4	0.4	10.3
Eastern Cape	32,588	0.5	0.5	16.5
Northern Cape	25,496	0.1	0.1	5.2

\*Change in basis points over Q1 2021. Geographic spread being the share of tourists visiting 2 provinces or more.

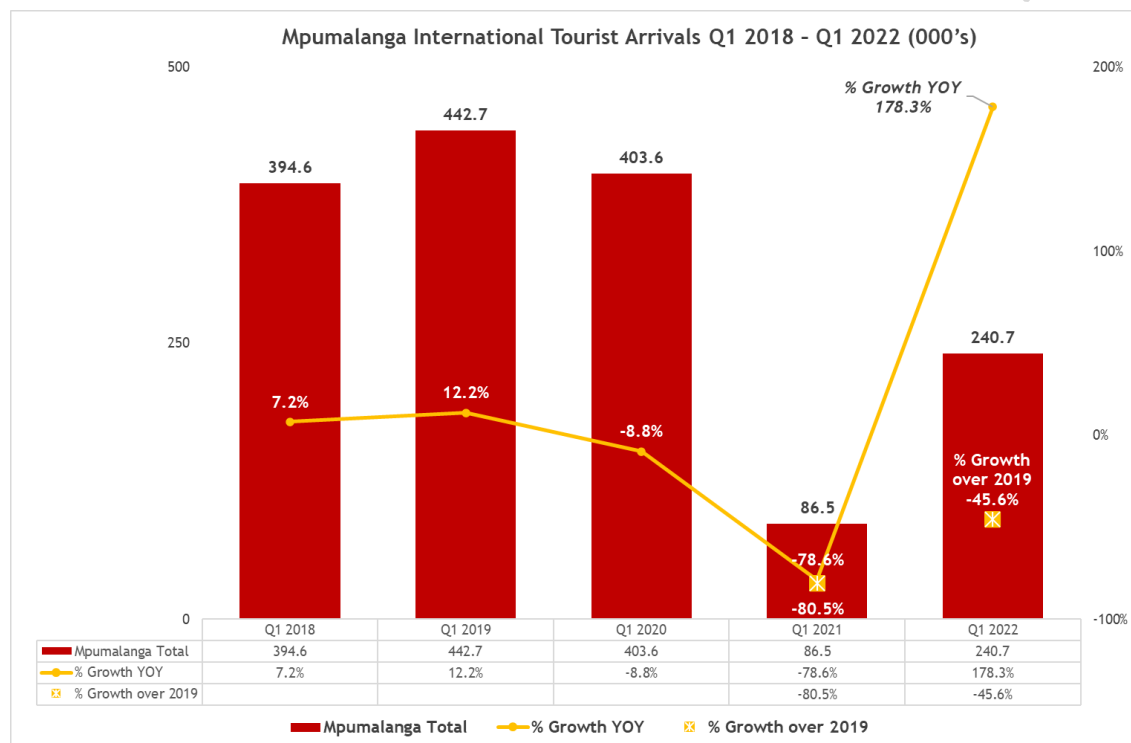
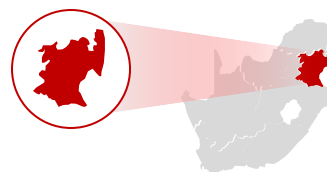


### Gauteng International Tourist Arrivals by Top 10 Markets Q1 2022

Gauteng Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Zimbabwe	117,129	11.6%	28.6%	7.7%
Lesotho	49,969	15.5%	12.2%	-65.6%
Mozambique	39,972	17.3%	9.8%	-75.3%
UK	25,406	4.8%	6.2%	-43.6%
Eswatini	23,735	5.7%	5.8%	-55.3%
Malawi	20,226	4.2%	4.9%	-48.9%
Botswana	19,658	6.4%	4.8%	-67.1%
USA	14,735	4.0%	3.6%	-60.4%
Germany	13,042	3.0%	3.2%	-54.4%
Zambia	12,396	3.4%	3.0%	-61.4%
All Gauteng Arrivals	409,008	100.0%	100.0%	-56.4%

### Share of Gauteng Tourist Arrivals by Main Purpose Q1 2022

Gauteng	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	35.8%	11.4%	19.7%	16.2%	5.1%	0.9%	1.8%	0.3%
Basis Point Change 19-22	-5.5%	-13.0%	13.5%	6.4%	-1.3%	-1.8%	0.9%	-1.2%



### Mpumalanga International Tourist Arrivals by Top 10 Markets Q1 2022

Mpumalanga Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Mozambique	179,879	48.2%	74.7%	-15.8%
Eswatini	20,532	21.0%	8.5%	-77.9%
Zimbabwe	8,725	0.5%	3.6%	273.7%
Germany	5,381	4.7%	2.2%	-74.1%
USA	4,905	3.7%	2.0%	-69.7%
UK	3,744	3.5%	1.6%	-75.9%
Lesotho	3,461	2.0%	1.4%	-60.0%
Netherlands	2,294	1.9%	1.0%	-73.0%
France	2,071	2.6%	0.9%	-82.2%
Zambia	1,070	0.2%	0.4%	-0.5%
Others in Top 10 Q1 2019:				
Canada	387	0.9%	0.2%	-90.3%
Brazil	181	1.1%	0.1%	-96.2%
<b>All Mpumalanga Arrivals</b>	<b>240,716</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-45.6%</b>

### Share of Mpumalanga Tourist Arrivals by Main Purpose Q1 2022

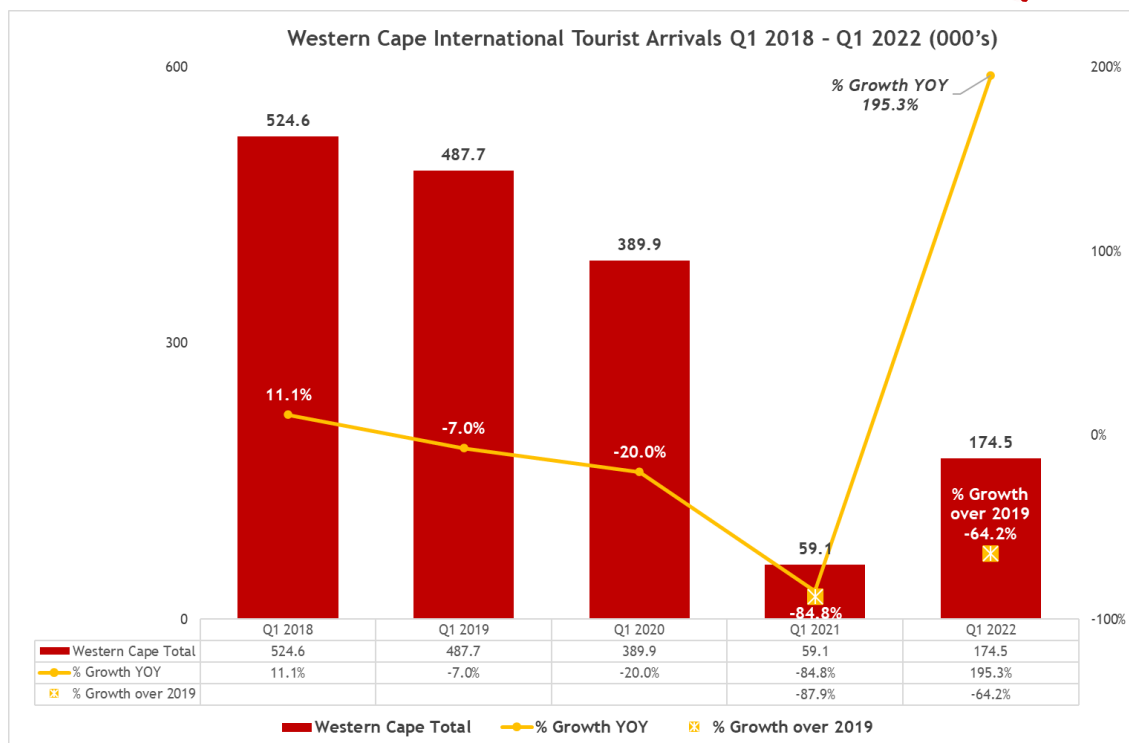
Mpumalanga	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	55.8%	14.1%	3.6%	9.7%	0.4%	11.9%	2.3%	0.1%
Basis Point Change 19-22	-3.6%	-17.2%	2.8%	8.6%	-0.4%	9.2%	1.6%	-0.9%

# WESTERN CAPE



174.5 THOUSAND

-64.2% ▼

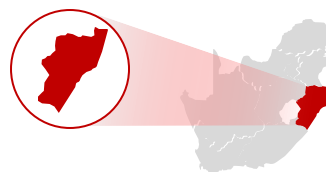
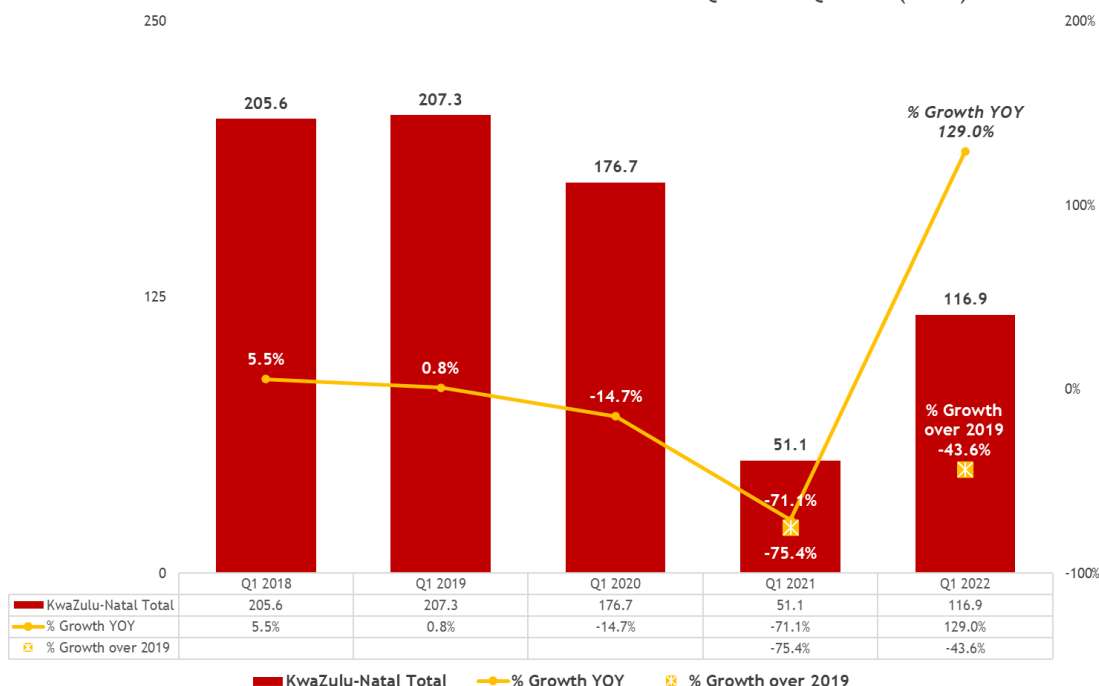


## Western Cape International Tourist Arrivals by Top 10 Markets Q1 2022

Western Cape Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
UK	35,019	18.1%	20.1%	-60.4%
Germany	25,967	14.5%	14.9%	-63.4%
Namibia	16,220	4.4%	9.3%	-24.3%
USA	15,272	9.3%	8.8%	-66.2%
Netherlands	10,612	4.6%	6.1%	-52.5%
France	7,389	5.8%	4.2%	-73.9%
Lesotho	7,032	1.2%	4.0%	24.8%
Switzerland	5,328	2.3%	3.1%	-53.4%
Zimbabwe	4,406	2.0%	2.5%	-54.1%
Belgium	3,341	1.7%	1.9%	-58.8%
Others in Top 10 Q1 2019:				
Canada	3,009	2.5%	1.7%	-74.8%
Sweden	2,219	2.4%	1.3%	-80.7%
Brazil	849	2.6%	0.5%	-93.3%
China including Hong Kong	643	2.4%	0.4%	-94.6%
All Western Cape Arrivals	174,488	100.0%	100.0%	-64.2%

## Share of Western Cape Tourist Arrivals by Main Purpose Q1 2022

Western Cape	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	36.3%	48.2%	3.8%	0.3%	6.5%	0.1%	0.8%	0.1%
Basis Point Change 19-22	15.7%	-15.0%	0.2%	-1.0%	1.2%	0.0%	0.5%	-0.1%

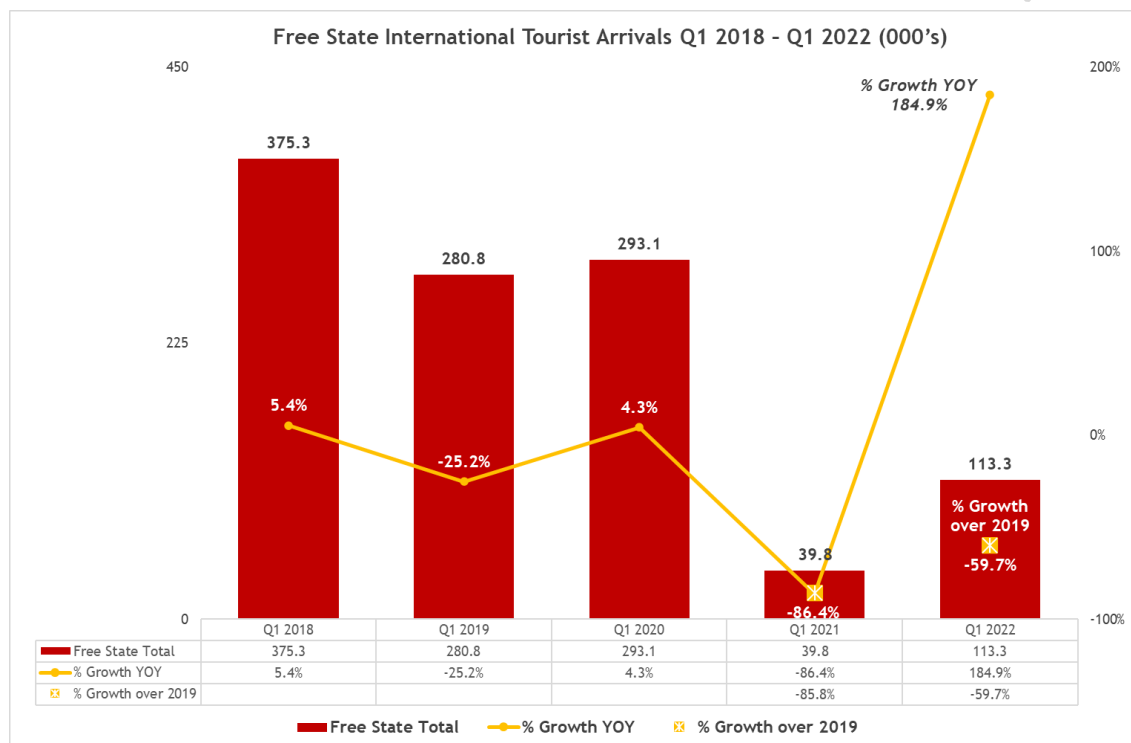

**KwaZulu-Natal International Tourist Arrivals Q1 2018 - Q1 2022 (000's)**

**KwaZulu-Natal International Tourist Arrivals by Top 10 Markets Q1 2022**

KwaZulu-Natal Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Zimbabwe	35,813	4.5%	30.6%	288.0%
Eswatini	23,509	34.9%	20.1%	-67.5%
Zambia	13,655	1.9%	11.7%	247.3%
UK	9,985	7.5%	8.5%	-35.9%
Lesotho	5,422	4.1%	4.6%	-36.4%
Germany	4,158	6.7%	3.6%	-69.9%
USA	3,373	4.7%	2.9%	-65.5%
Mozambique	1,807	1.6%	1.5%	-44.4%
France	1,412	3.8%	1.2%	-82.3%
India	1,340	1.3%	1.1%	-50.4%
Others in Top 10 Q1 2019:				
Botswana	1,227	4.3%	1.0%	-86.1%
Netherlands	1,199	2.6%	1.0%	-77.6%
Australia	1,106	2.1%	0.9%	-75.0%
<b>All KwaZulu-Natal Arrivals</b>	<b>116,911</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-43.6%</b>

**Share of KwaZulu-Natal Tourist Arrivals by Main Purpose Q1 2022**

KwaZulu-Natal	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	24.9%	16.7%	27.3%	22.4%	2.1%	0.8%	0.2%	1.2%
Basis Point Change 19-22	-19.5%	-16.5%	24.0%	17.5%	-2.0%	-0.9%	0.0%	-0.8%





### Free State International Tourist Arrivals by Top 10 Markets Q1 2022

Free State Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Lesotho	102,513	90.7%	90.5%	-59.7%
Botswana	2,207	1.8%	1.9%	-57.3%
Eswatini	1,199	0.2%	1.1%	151.3%
Zimbabwe	1,134	0.6%	1.0%	-37.6%
UK	1,072	0.8%	0.9%	-50.1%
USA	1,002	0.6%	0.9%	-42.3%
Mozambique	598	0.0%	0.5%	446.0%
Namibia	499	0.3%	0.4%	-45.7%
Germany	485	1.0%	0.4%	-83.3%
Netherlands	394	0.4%	0.3%	-68.6%
Others in Top 10 Q1 2019:				
Australia	215	0.3%	0.2%	-76.8%
Malawi	0	0.5%	0.0%	-100.0%
China including Hong Kong	0	0.5%	0.0%	-100.0%
<b>All Free State Arrivals</b>	<b>113,278</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-59.7%</b>

### Share of Free State Tourist Arrivals by Main Purpose Q1 2022

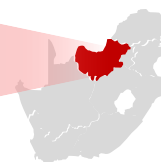
Free State	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	58.0%	2.4%	2.6%	2.7%	0.4%	1.0%	1.3%	1.4%
Basis Point Change 19-22	-18.0%	-1.9%	2.2%	1.0%	0.0%	-7.4%	1.2%	0.2%

# NORTH WEST

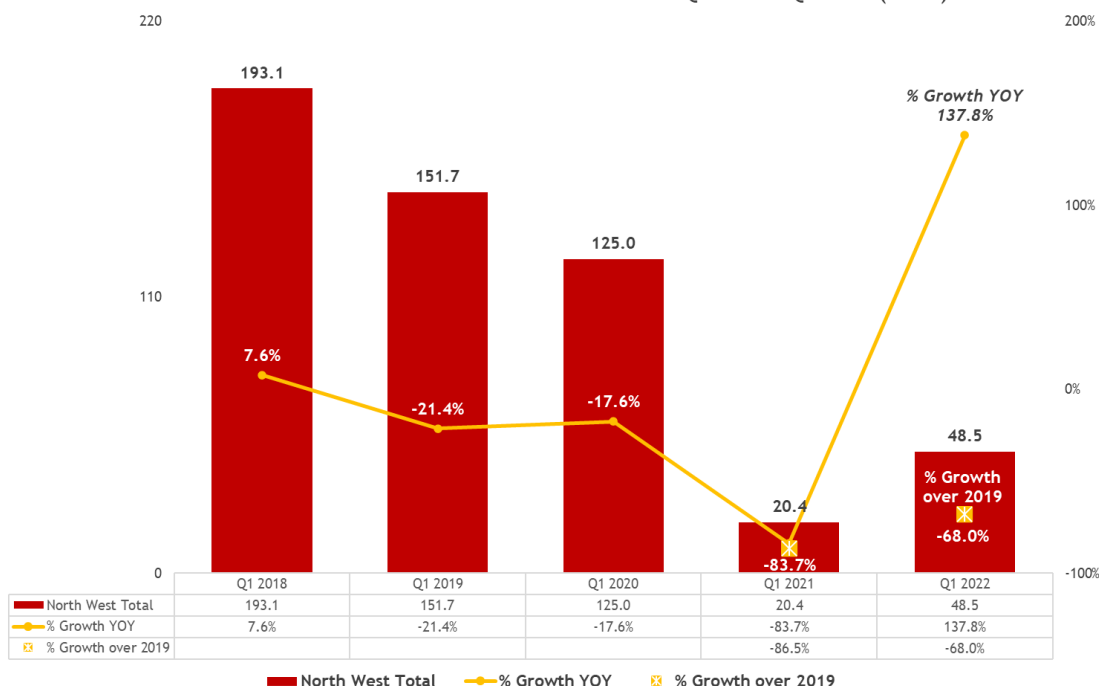


48.5 THOUSAND

-68.0% ▼



North West International Tourist Arrivals Q1 2018 - Q1 2022 (000's)

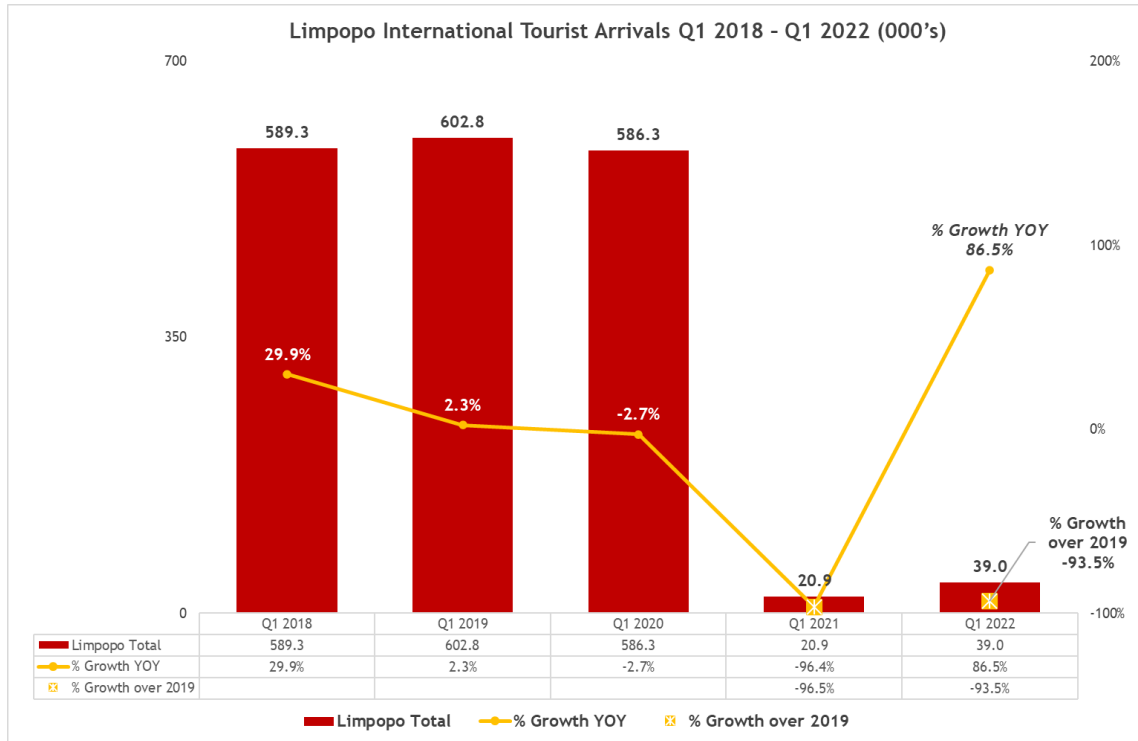


North West International Tourist Arrivals by Top 10 Markets Q1 2022

North West Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Botswana	15,120	38.7%	31.2%	-74.2%
Lesotho	13,425	20.4%	27.7%	-56.7%
Zimbabwe	6,297	4.8%	13.0%	-13.9%
UK	1,723	4.1%	3.6%	-72.4%
Germany	1,642	2.5%	3.4%	-56.4%
USA	1,544	3.2%	3.2%	-68.7%
Namibia	1,366	1.9%	2.8%	-52.7%
Mozambique	1,191	5.6%	2.5%	-86.0%
Eswatini	1,011	1.5%	2.1%	-54.7%
Netherlands	487	0.8%	1.0%	-58.2%
Others in Top 10 Q1 2019:				
India	113	1.7%	0.2%	-95.7%
China including Hong Kong	27	1.5%	0.1%	-98.8%
All North West Arrivals	48,536	100.0%	100.0%	-68.0%

Share of North West Tourist Arrivals by Main Purpose Q1 2022

North West	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	39.8%	13.1%	16.9%	13.1%	1.8%	0.4%	2.1%	1.4%
Basis Point Change 19-22	-9.2%	-6.1%	12.7%	-1.0%	-1.4%	-1.6%	1.8%	0.9%

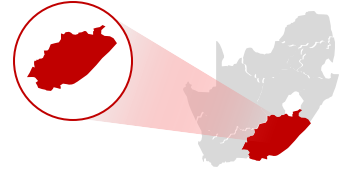


### Limpopo International Tourist Arrivals by Top 10 Markets Q1 2022

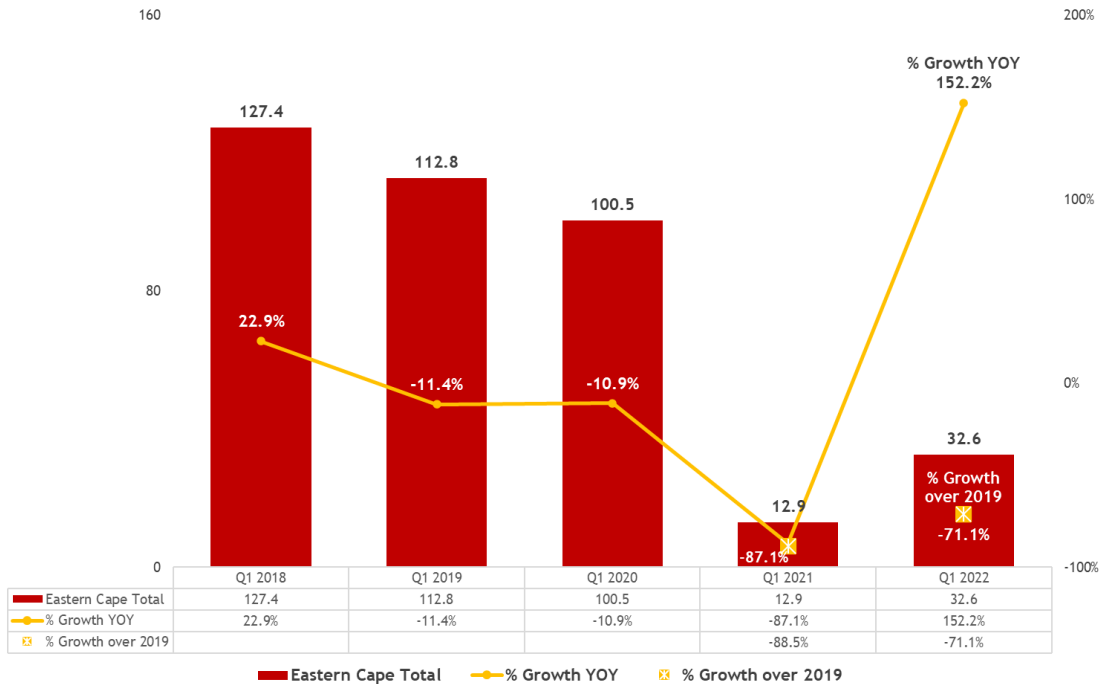
Limpopo Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Zimbabwe	13,452	86.1%	34.5%	-97.4%
Botswana	6,098	5.2%	15.6%	-80.4%
UK	2,792	0.9%	7.2%	-48.9%
USA	2,649	1.0%	6.8%	-56.5%
Germany	2,517	1.0%	6.5%	-57.9%
Mozambique	2,111	0.6%	5.4%	-39.1%
Eswatini	1,130	0.2%	2.9%	18.5%
Netherlands	1,078	0.4%	2.8%	-55.9%
France	827	0.5%	2.1%	-74.0%
Denmark	699	0.3%	1.8%	-55.3%
Others in Top 10 Q1 2019:				
Malawi	403	0.5%	1.0%	-86.3%
Sweden	189	0.3%	0.5%	-89.7%
<b>All Limpopo Arrivals</b>	<b>39,006</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-93.5%</b>

### Share of Limpopo Tourist Arrivals by Main Purpose Q1 2022

Limpopo	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	25.4%	22.4%	19.8%	24.1%	2.5%	1.0%	0.7%	0.4%
Basis Point Change 19-22	11.5%	11.4%	19.2%	4.1%	2.2%	-49.2%	0.3%	-1.4%



Eastern Cape International Tourist Arrivals Q1 2018 - Q1 2022 (000's)



Eastern Cape International Tourist Arrivals by Top 10 Markets Q1 2022

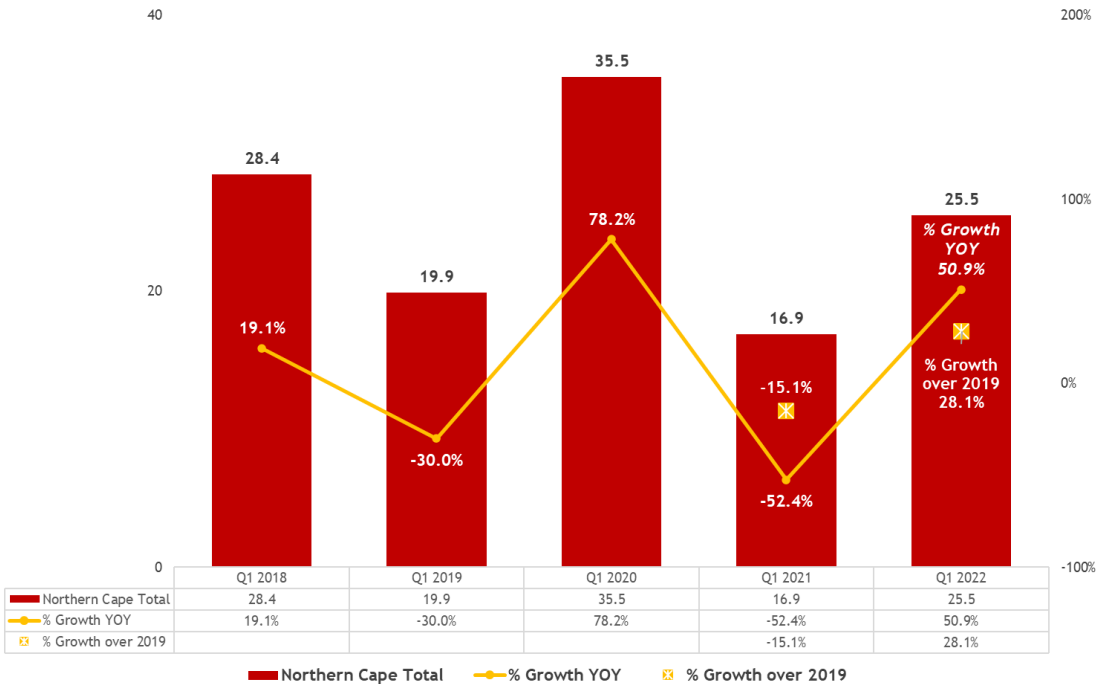
Eastern Cape Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Germany	5,845	21.2%	17.9%	-75.6%
UK	5,764	16.3%	17.7%	-68.7%
USA	2,969	6.3%	9.1%	-58.0%
Netherlands	2,245	5.8%	6.9%	-65.9%
Zimbabwe	1,667	1.4%	5.1%	1.9%
Lesotho	1,312	1.9%	4.0%	-39.1%
Switzerland	1,103	2.7%	3.4%	-64.3%
France	949	4.1%	2.9%	-79.4%
Belgium	867	2.1%	2.7%	-63.2%
Eswatini	835	0.0%	2.6%	n/a
Others in Top 10 Q1 2019:				
Canada	605	2.4%	1.9%	-77.3%
Australia	437	2.9%	1.3%	-86.9%
Brazil	157	3.1%	0.5%	-95.5%
China including Hong Kong	114	2.9%	0.3%	-96.5%
All Eastern Cape Arrivals	32,588	100.0%	100.0%	-71.1%

Share of Eastern Cape Tourist Arrivals by Main Purpose Q1 2022

Eastern Cape	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	38.8%	40.3%	6.7%	0.7%	4.9%	0.1%	0.1%	0.5%
Basis Point Change 19-22	17.6%	-23.9%	3.2%	-0.6%	2.6%	0.1%	0.0%	-0.2%



Northern Cape International Tourist Arrivals Q1 2018 - Q1 2022 (000's)



Northern Cape International Tourist Arrivals by Top 10 Markets Q1 2022

Northern Cape Top 10 Markets Q1 2022	Tourist Arrivals Q1 2022	% Share Q1 2019	% Share Q1 2022	% Growth Q1 2019 - Q1 2022
Namibia	18,891	34.8%	74.1%	172.5%
Lesotho	2,413	15.5%	9.5%	-21.9%
Germany	669	8.6%	2.6%	-60.9%
USA	652	4.9%	2.6%	-33.6%
Netherlands	442	2.5%	1.7%	-10.3%
UK	379	7.6%	1.5%	-75.1%
Denmark	194	0.3%	0.8%	213.3%
Belgium	147	0.3%	0.6%	147.6%
Spain	132	0.3%	0.5%	119.6%
Switzerland	118	2.0%	0.5%	-70.1%
Others in Top 10 Q1 2019:				
Botswana	103	4.3%	0.4%	-87.9%
France	88	2.6%	0.3%	-82.9%
Brazil	47	1.8%	0.2%	-86.7%
<b>All Northern Cape Arrivals</b>	<b>25,496</b>	<b>100.0%</b>	<b>100.0%</b>	<b>28.1%</b>

Share of Northern Cape Tourist Arrivals by Main Purpose Q1 2022

Northern Cape	VFR	Holiday	Business Traveller	Business Shopping	MICE	Personal Shopping	Medical	Religion
Share Q1 2022	50.5%	16.1%	14.0%	0.5%	2.8%	0.0%	3.0%	0.5%
Basis Point Change 19-22	2.1%	-4.3%	7.9%	-4.9%	1.0%	-6.6%	3.0%	0.5%





# DOMESTIC TOURISM PERFORMANCE



# SUMMARY OF KEY FINDINGS



In the 1<sup>st</sup> quarter of 2022, there were

**6.2 million overnight domestic trips.**

This is +28.2% more than the number of trips in Q1 2019. Domestic trips continue to be mainly for VFR (48.3%) and Holiday (27.1%) purposes although VFR has yet to recover fully to its Q1 2019 levels (63.5%). However, almost the same amount of trips were travelled for VFR in Q1 2022 as in Q1 2019.



Overnight domestic tourism generated a total of

**ZAR 18.9 billion in revenue,**

representing an increase of +130.9% over Q1 2019.

These higher spend numbers, coupled with a much lower increase in trips, have come to mean a +80.5% increase in **average spend** to equal **ZAR 3,050**



The duration of

**domestic trips was 3.4 nights,**

meaning a decline of -11.6% vs. Q4 2019.

Higher trip numbers, coupled with a longer stay, resulted

in a total of **21.0 million bed nights,**

constituting a significant increase of +13.3% over Q4 2019.

This first quarter, domestic trips have recovered tremendously reaching 6.2 million trips, meaning growth of +28.2% over Q1 2019 and +131.2% over Q1 2021. Domestic trips continue to be mainly for VFR (48.3%) and Holiday (27.1%) purposes although VFR has yet to recover fully to its Q1 2019 levels (63.5%). Holidays on the other hand, have overtaken Q1 2019 levels by +4.6% basis points. The share of VFR trips (48.3%) is much lower than in Q1 2019 (63.5%) but in absolute terms, almost the same amount of trips were travelled for VFR in Q1 2022 as in Q1 2019.

Q1 2022 also saw a marked increase in the number of domestic tourists (+27.5% over Q1 2019). The number of domestic tourists amounted to 5.9 million, with this figure being +122.4% greater than Q1 2021. The recovery is also evident when compared to Q1 2021's decline of -42.7% over Q1 2019. The average number of trips per tourist remains very similar to previous years (0.9).

Domestic spend has seen phenomenal growth this quarter, rising by +130.9 over Q1 2019 and by +134.4% over Q1 2021. In line with the growth in spend, comes an increase in average spend which now equals ZAR 3,050. This result is *higher by only +1.3% from Q1 2021 when average spend was ZAR 3,010*, but has almost doubled the Q1 2019 result (ZAR 1,690).

This quarter, almost all provinces registered growth in trip origination when compared to Q1 2019. Most remarkable is the growth in trips originating from the North West (+359.4%), KwaZulu-Natal (+317.2%), the Eastern Cape (+220.6%) as well as the Western Cape (+152.4%). KwaZulu-Natal now tops the list with 1.6 million domestic trips.

This first quarter, the Eastern Cape also shows great growth as a destination (+402.5%), and so do the Northern Cape (+271.3%), Mpumalanga (+234.4%), as well as KwaZulu-Natal (+165.7%). KwaZulu-Natal, having suffered losses in Q3 and Q4 of 2021 due to the July riots, is now top of the destination list with an astounding 2.2 million trips. Second to KZN is only Gauteng with 1.3 million trips, most other provinces receiving around 0.5-0.7 million trips.

# DOMESTIC TOURISM PERFORMANCE

DOMESTIC TRIPS



6.2 MILLION

+28.2% ▲

DOMESTIC SPEND



ZAR 18.9 BILLION

+130.9% ▲

AVERAGE SPEND  
PER TRIP



ZAR 3,050

+80.5% ▲

BED NIGHTS



21.0 MILLION

+13.3% ▲

LENGTH OF STAY



3.4 NIGHTS

-11.6% ▼

DAY TRIPS



35.2 MILLION

+1.0% ▲

DAY TRIP SPEND



ZAR 34.3 BILLION

+22.9% ▲

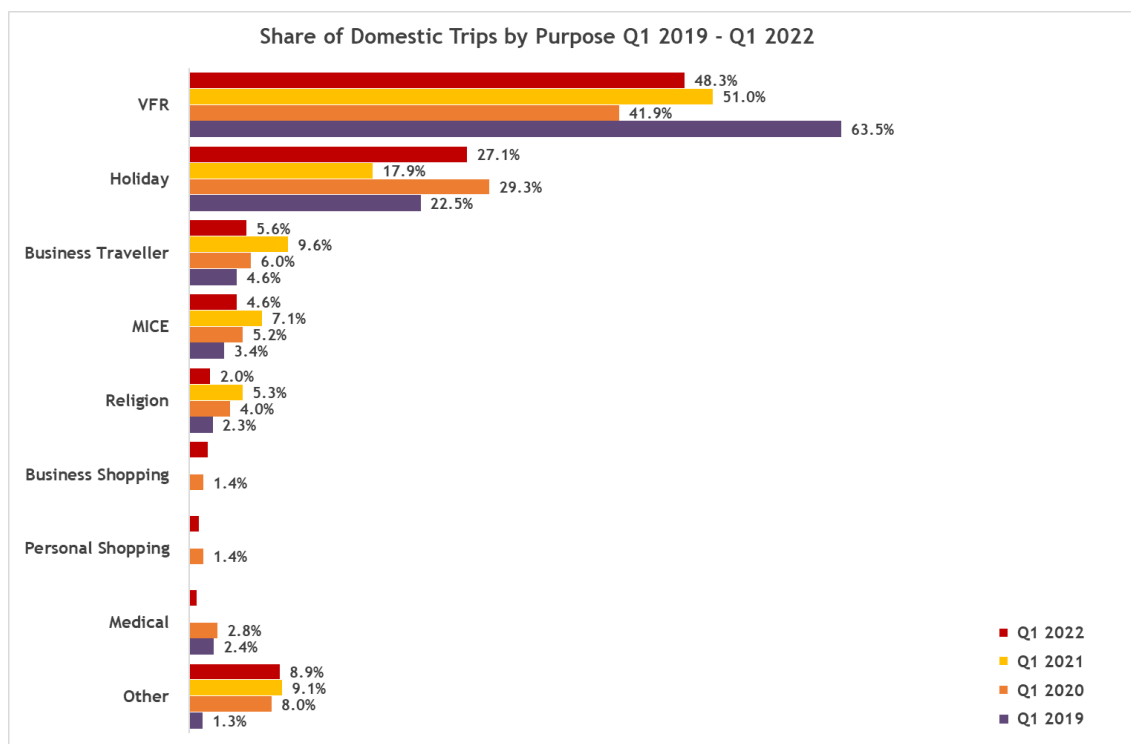
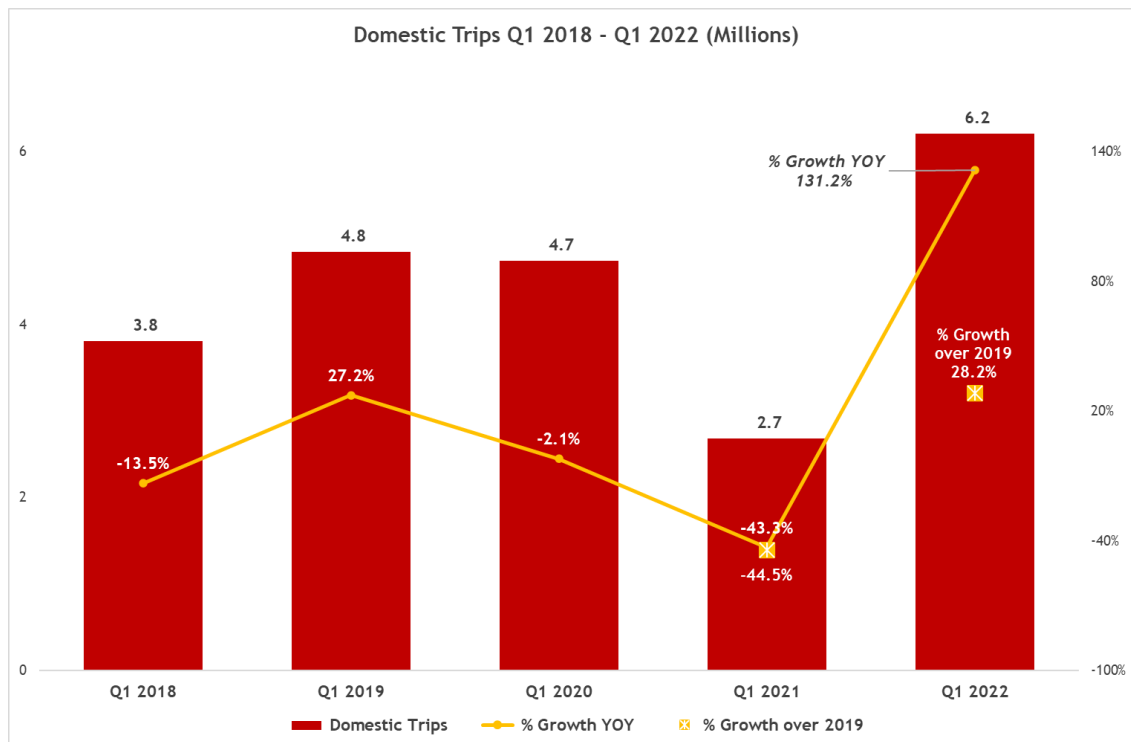
## DOMESTIC TRIPS



6.2 MILLION

+28.2%▲

Domestic trips have recovered tremendously reaching 6.2 million trips, meaning growth of +28.2% over Q1 2019 and +131.2% over Q1 2021. This growth also compares very well with Q1 2021's drop of -44.5% over Q1 2019. Domestic trips continue to be mainly for VFR (48.3%) and Holiday (27.1%) purposes although VFR has yet to recover fully to its Q1 2019 levels (63.5%). Holidays on the other hand, have overtaken Q1 2019 levels by +4.6% basis points.





Profiling VFR tourists in Q1 2022 reveals that the majority of them are single and have never been married (67.3%, +16.8% basis points over Q1 2019), are females (54.5%), and earn less than or equal to ZAR 5,000 (53.7%). Expectedly, many are young, between 18-34 years (42.4%) but less so (-13.5% basis points over Q1 2019) and have no children (27.5%). Compared to Q1 2019, many more of them have none or only primary schooling (18.8%) whereas this quarter the corresponding figure is 7.8%.

## VFR

### Education



Completed high school:  
28.2%

### Gender



Male:  
45.5%

### Marital Status



Single/Never married:  
67.3%

### Family Situation



No children:  
27.5%

### Income



Less than or equal to  
R 5,000: 53.7%

### Age Group



18-34 years:  
42.4%

Holiday tourists profiles paint a different picture from their VFR counterparts. These tourists are mostly males (80.8%, +22.8% points over Q1 2019), earning more than ZAR 5,000 (51.9%). They are older, 57.1% of them being 25-34 year old (38% points over 2019). They are also better educated, with 41.7% of them having completed tertiary education. However, very much like VFR tourists, the bulk of them are single and have never been married (69.2%) and this is much more so currently than before (+48.0% points over 2019).

## Holiday

### Education



Completed tertiary:  
41.7%

### Gender



Female:  
19.2%

### Marital Status



Married:  
30.3%

### Family Situation



Dependent children:  
31.9%

### Income



More than R 5,000:  
51.9%

### Age Group



35+ years:  
33.5%

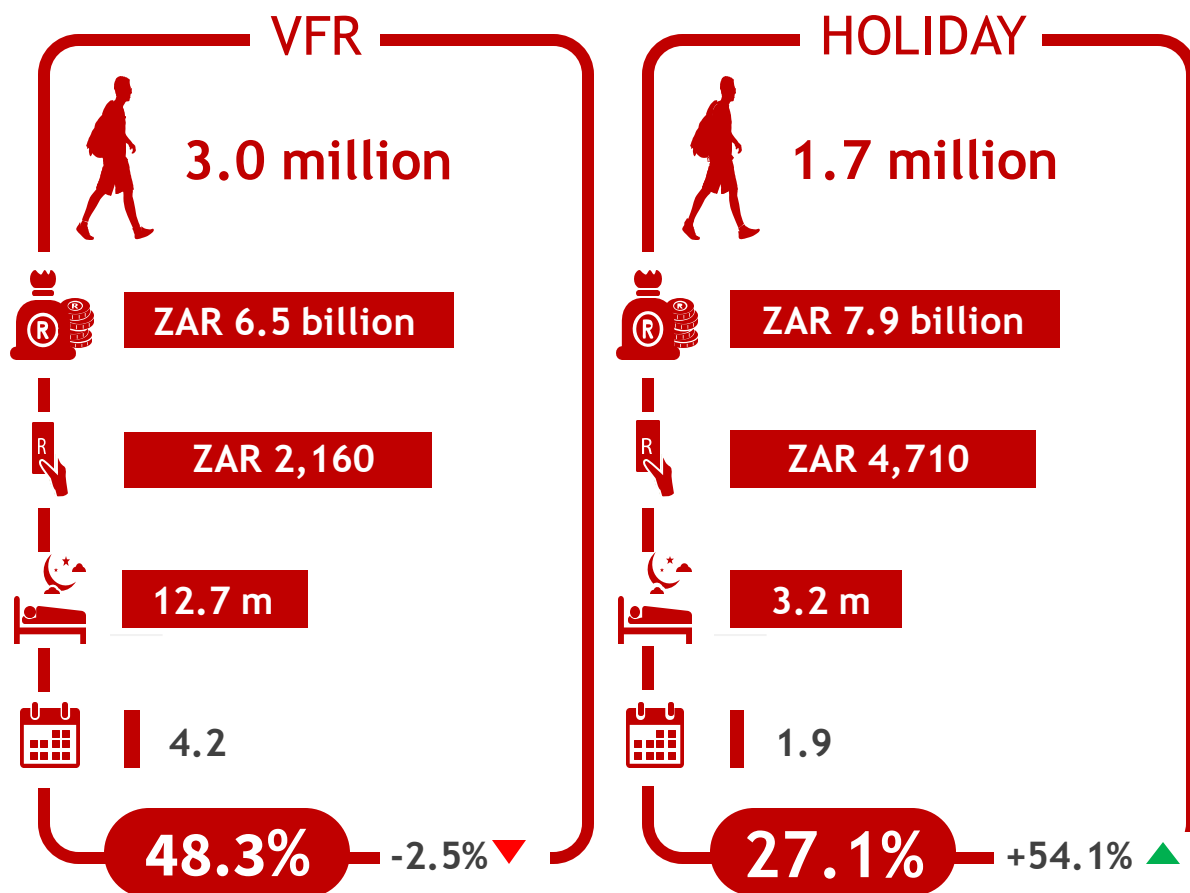


## DOMESTIC TRIPS



6.2 MILLION

+28.2%▲

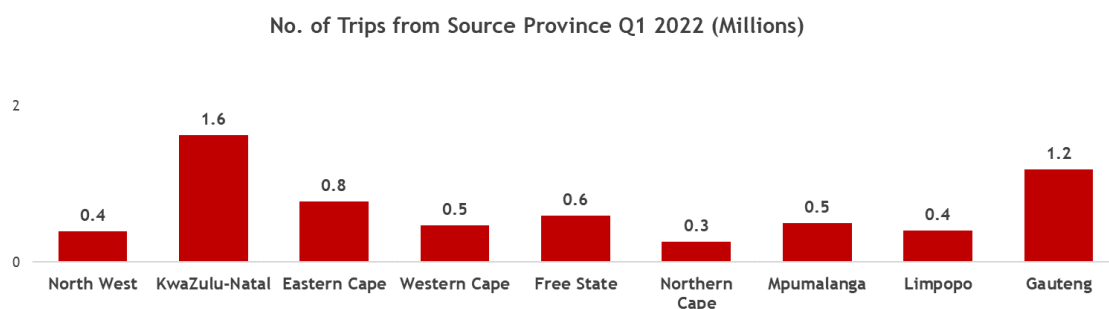
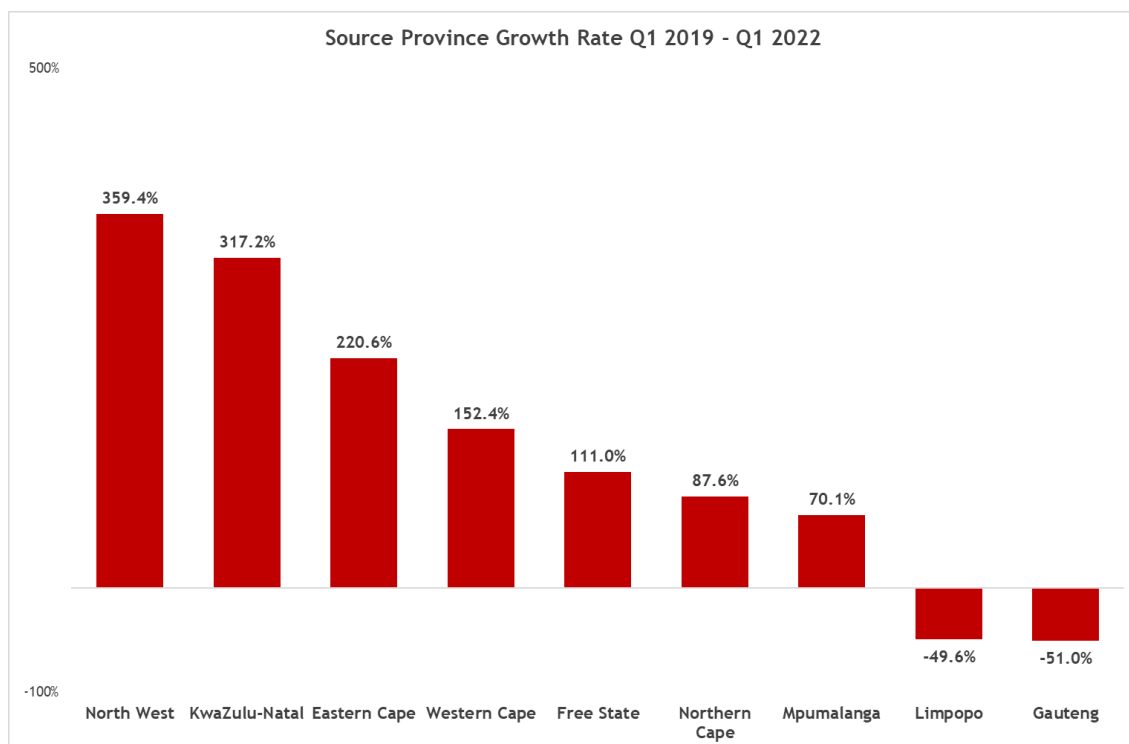


- The share of VFR trips this first quarter (48.3%) is much lower than its share in Q1 2019 (63.5%) although in absolute terms, almost the exact same amount of trips were travelled for VFR purposes in Q1 2022 as in Q1 2019 (3.0 & 3.1 million respectively or -2.5%).
- The lower VFR share is clearly due to the relaxation of Covid-19 regulations and the discussions regarding the end of the State of National Disaster as early as February 2022. The growth in Holiday trips (+54.1%) of course also indicates that South Africans took the opportunity to holiday much more than ever before.
- The total VFR spend has gone up by +71.25 and is now ZAR 6.5 billion. Average spend on VFR has grown by +75.0% since Q1 2019 and equals ZAR 2,160. Bed nights and length of stay have gone down by -8.0% and -5.6% respectively and now amount to 12.7 million and 4.2 nights respectively.

- Contrary to VFR trips, Holiday trips have increased their share to 27.1% from 22.5% in Q1 2019. This is accompanied by a marked increase in the actual number of Holiday trips, rising by +54.1% to reach 1.7 million whereas in Q1 2019 the equivalent was 1.1 million Holiday trips.
- It's not surprising that total spend on Holiday trips in Q1 2022 has increased by +140.3% and now stands on ZAR 7.9 billion. Average spend on Holiday trips has also increased by +55.9 and is now ZAR 4,710. It is clear then, that more people holidayed locally and also spent more.
- Probably as a consequence of more Holiday trips which are shorter as part of the mix, length of stay has gone down by -19.0% since Q1 2019 and now stands on 1.9 nights. Due to higher number of persons holidaying, total Bed nights have gone up by +24.8% to reach 3.2 million.



This quarter, almost all provinces registered positive growth rates when compared to Q1 2019. Most remarkable is the growth in trips originating from the North West (+359.4%), KwaZulu-Natal (+317.2%), the Eastern Cape (+220.6%) as well as the Western Cape (+152.4%). The Limpopo province as well as Gauteng, are the only ones to show negative growth rates of -49.6% and -51.0% respectively. Hence, whereas in Q1 2019 2.4 and 0.8 million domestic trips originated from the Gauteng and Limpopo provinces, the respective figures for this quarter are only 1.2 and 0.8 million. This change in dynamics must be due to the varying Covid-19 regulations and the various degree of Covid-19 manifestation per province. KwaZulu-Natal now tops the list with 1.6 million domestic trips.

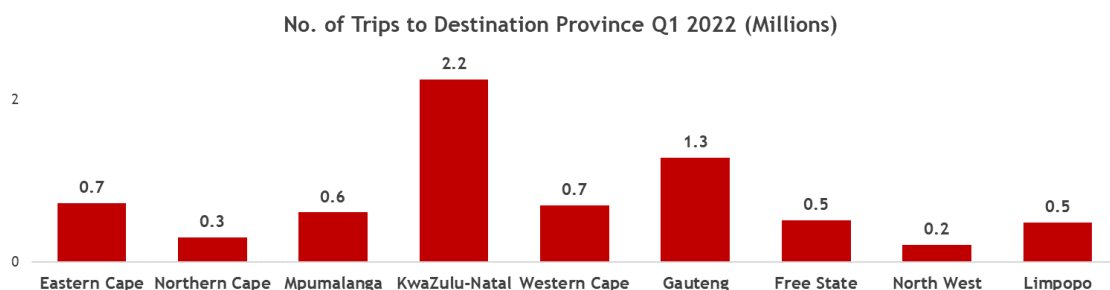
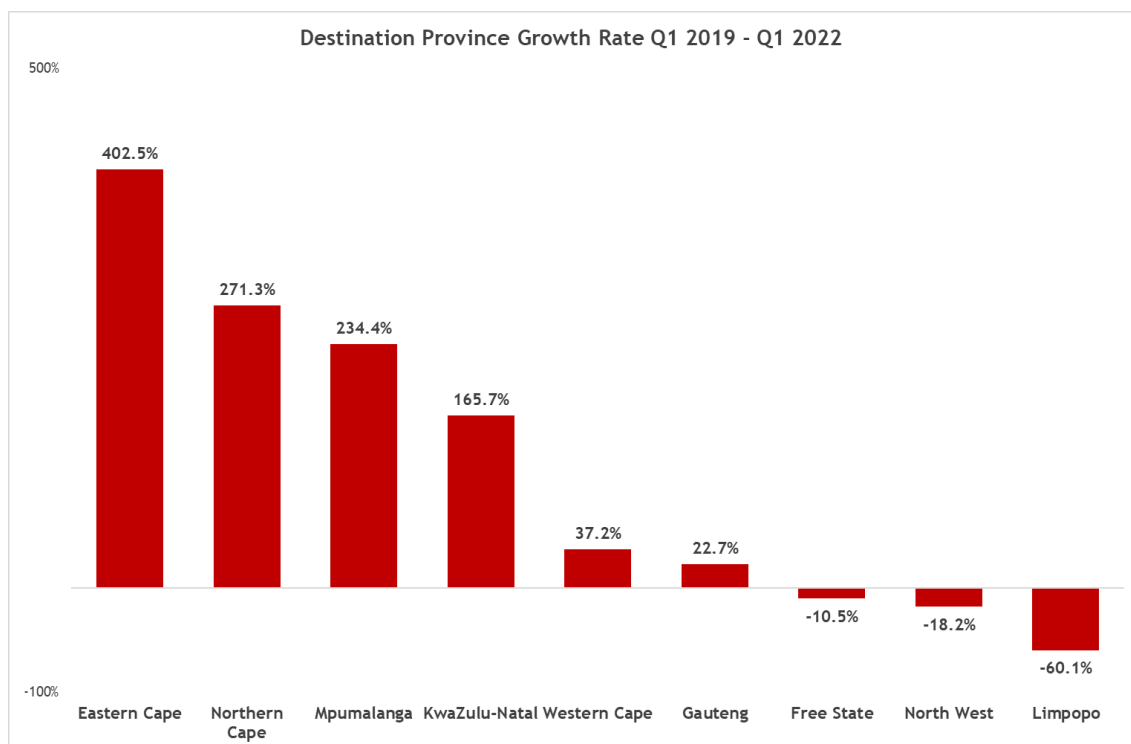


No. of Trips from Source Province Q1 2019 - Q1 2022

No. of Trips from Source	North West	KwaZulu-Natal	Eastern Cape	Western Cape	Free State	Northern Cape	Mpumalanga	Limpopo	Gauteng
Q1 2019	85,650	388,578	240,983	186,379	280,167	140,657	293,663	807,922	2,413,654
Q1 2020	801,298	1,133,591	561,498	928,257	177,380	187,422	62,009	119,052	765,303
Q1 2021	279,509	657,032	584,263	285,133	123,442	33,253	144,554	2,672	573,138
Q1 2022	393,485	1,621,267	772,710	470,503	591,238	263,943	499,430	407,518	1,183,058



This first quarter, the Eastern Cape also shows great growth as a destination (+402.5%), and so do the Northern Cape (+271.3%), Mpumalanga (+234.4%), as well as KwaZulu-Natal (+165.7%). The provinces which have shrunk in terms of being a domestic destination and are showing negative growth rates over Q1 2019 are the Free State (-10.5%), the North West (-18.2%), as well as Limpopo (-60.1%). KwaZulu-Natal, having suffered losses in Q3 and Q4 of 2021 due to the July riots, is now top of the destination list with an astounding 2.2 million trips. Second to KwaZulu-Natal is only Gauteng with 1.3 million trips, the majority of other province receiving trips in the range of 0.5-0.7 million (Limpopo, Free State, Mpumalanga, Eastern Cape, Western Cape).

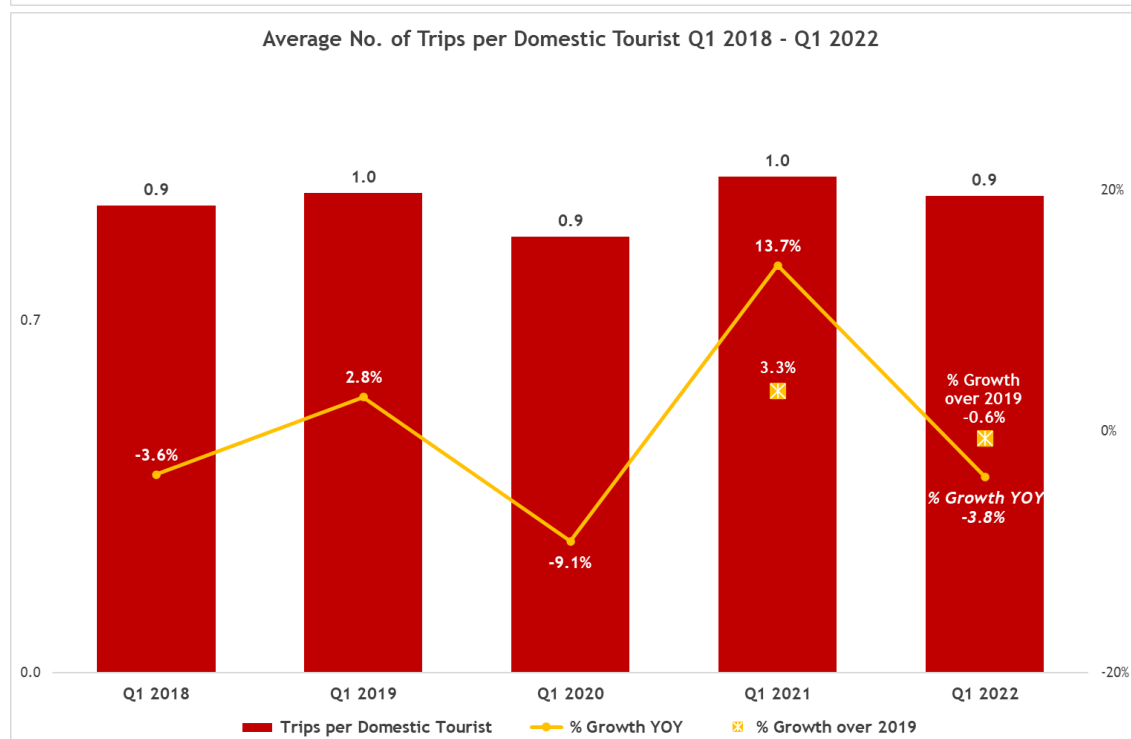
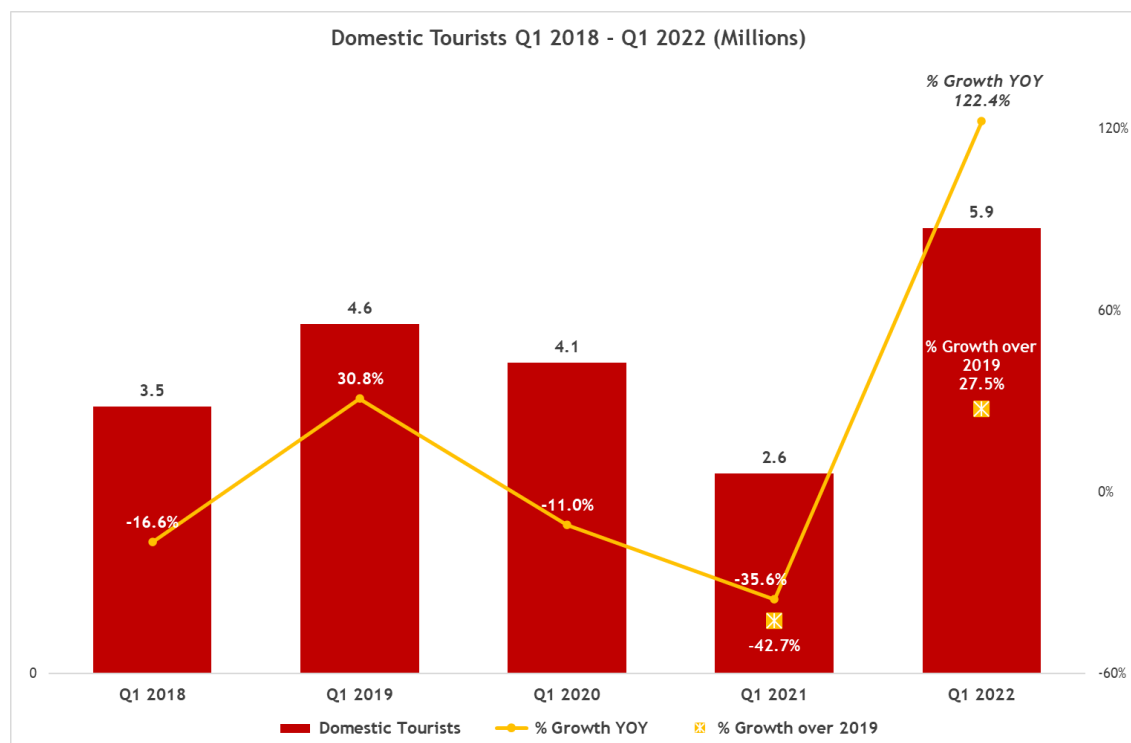


**No. of Trips to Destination Province Q1 2019 - Q1 2022**

No. of Trips to Destination	Eastern Cape	Northern Cape	Mpumalanga	KwaZulu-Natal	Western Cape	Gauteng	Free State	North West	Limpopo
Q1 2019	143,121	81,353	182,116	842,784	504,811	1,040,552	572,229	259,229	1,216,409
Q1 2020	557,243	319,342	252,729	1,010,981	1,404,275	1,233,310	601,336	728,222	272,026
Q1 2021	495,791	12,072	325,227	709,680	213,880	544,255	183,413	307,514	2,672
Q1 2022	719,141	302,091	609,046	2,239,588	692,542	1,277,247	512,273	211,947	485,383



As already highlighted, Q1 2022 saw a marked increase in the number of domestic trips (+28.2%) and has also registered a comparable increase in the number of domestic tourists (+27.5%, both over Q1 2019). The number of domestic tourists this quarter amounted to 5.9 million, with this figure being +122.4% *greater than Q1 2021*. The recovery is also evident when the +27.5% growth is compared to the Q1 2021's -42.7% decline over 2019. The average number of trips per tourist remains very similar to previous years (0.9).



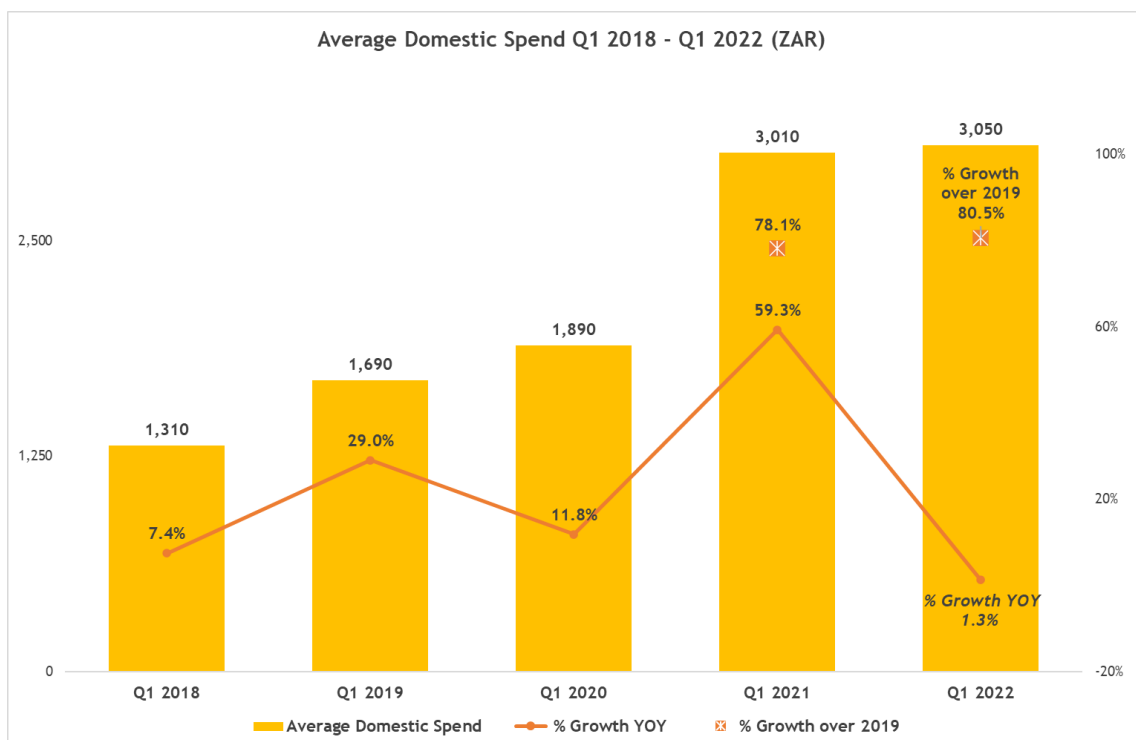
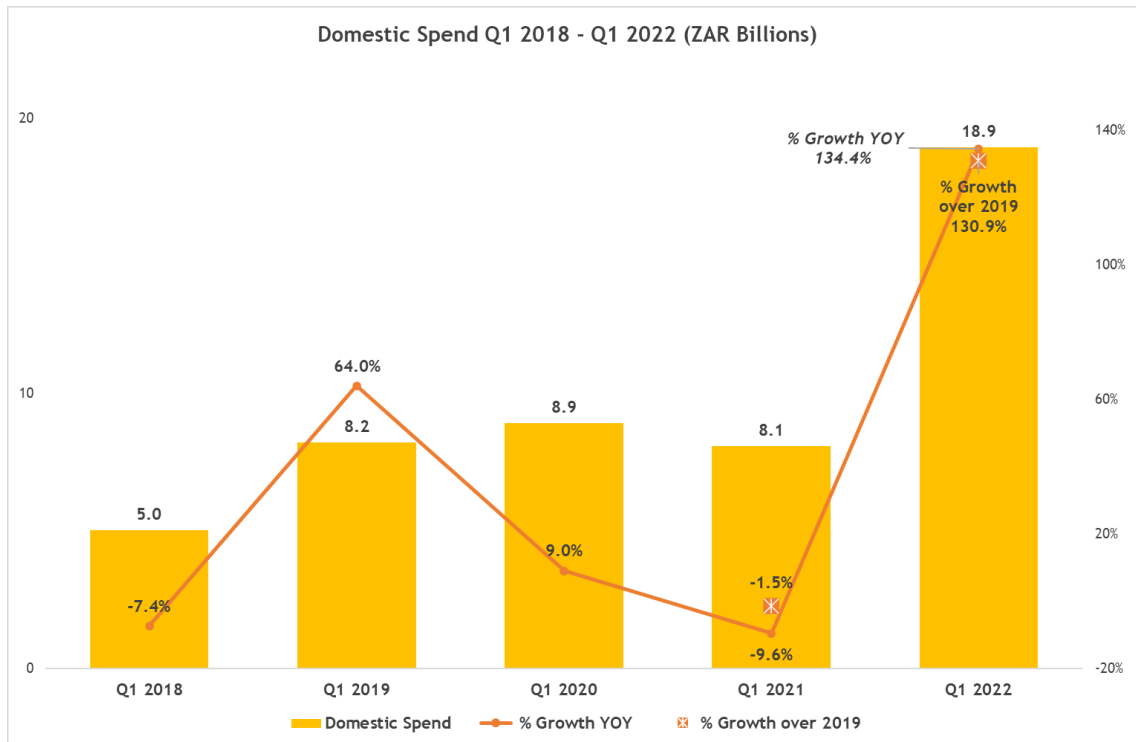
## DOMESTIC SPEND



ZAR 18.9 BILLION

+130.9% ▲

Domestic spend has seen phenomenal growth this quarter, rising by +130.9 over Q1 2019 and by +134.4% over Q1 2021. This astounding growth comes on the back of a slight decline in Q1 2021 (-1.5% over Q1 2019). In line with the growth in spend, comes an increase in average spend which now equals ZAR 3,050. This result is *higher by only +1.3% from Q1 2021 when average spend was ZAR 3,010*, but has almost doubled the Q1 2019 result (ZAR 1,690).





## DOMESTIC SPEND



ZAR 18.9 BILLION

+130.9% ▲







Average Domestic Spend by Purpose Q1 2018 - Q1 2022 (ZAR)

Average Domestic Spend	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022
VFR	990	1,230	1,190	1,330	2,160
Holiday	2,140	3,020	3,490	3,290	4,710
MICE	1,000	2,240	1,840	17,150	4,140

Holidaymakers spent the highest amount per trip with their average spend peaking this quarter at ZAR 4,710 meaning +55.9% growth over Q1 2019 and +43.2% over Q1 2021. Notably as well, the average spend on MICE has *come down since Q1 2021* (-75.9) and average spend on VFR has almost doubled since Q1 2019 (+75.6%) and Q1 2021 (+62.4%).

Given the overall rise in domestic spend, all categories of expenditure have increased over Q1 2019 as well as over all other years since. Most notable is the growth in Business Shopping (+4337.4%) as well as Leisure (+370.0%). These two expenditure categories have come off an extremely low base and hence the triple digit growth.

Domestic Spend by Category Q1 2019 - Q1 2022 (ZAR Billions)

	Q1 2019	Q1 2020	Q1 2021	Q1 2022	% Growth 2019-2022
 Transport	2.8	2.5	1.6	4.6	+64.0%
 Accommodation	2.3	3.0	1.0	3.1	+35.0%
 Food	1.4	2.1	1.8	2.2	+54.5%
 Leisure	0.5	0.5	0.2	2.2	+370.0%
 Personal Shopping	1.0	1.2	0.2	1.0	+3.5%
 Business Shopping	0.01	0.2	0.1	0.6	+4337.4%

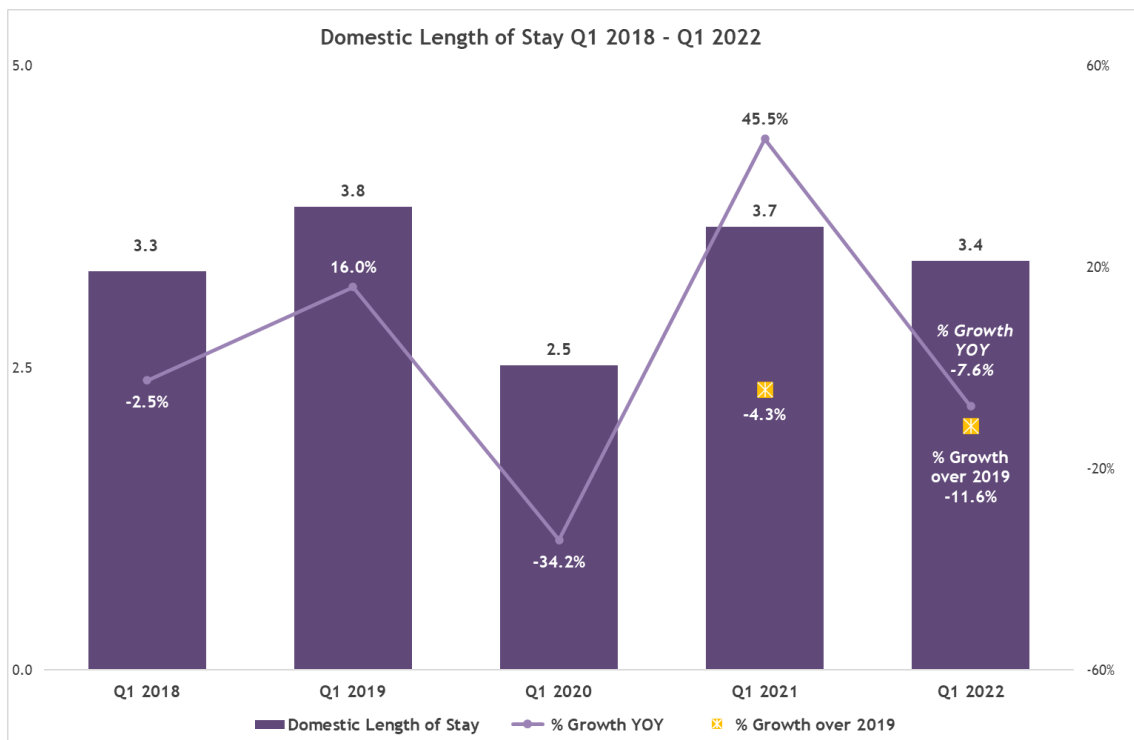
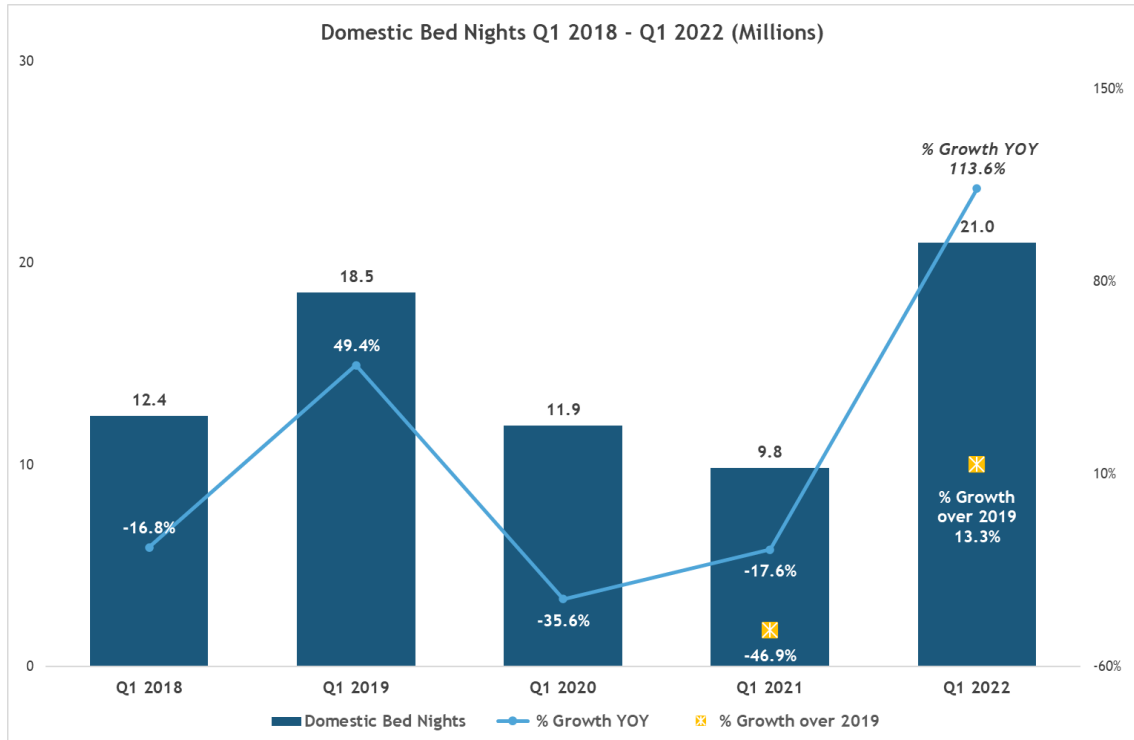
## BED NIGHTS



21.0 MILLION

+13.3%▲

The number of bed nights South African spent away from their homes has *increased tremendously when compared with Q1 2021 (+113.6%)*. These are clear signs of recovery as the total of 21.0 million bed nights is also +13.3% greater than the number of bed nights in Q1 2019. Length of stay on the other hand, has shortened slightly to 3.4 (-11.6% vs. Q1 2019 and -7.6% vs. Q1 2021). This is due to a greater number of shorter trips taken this quarter.



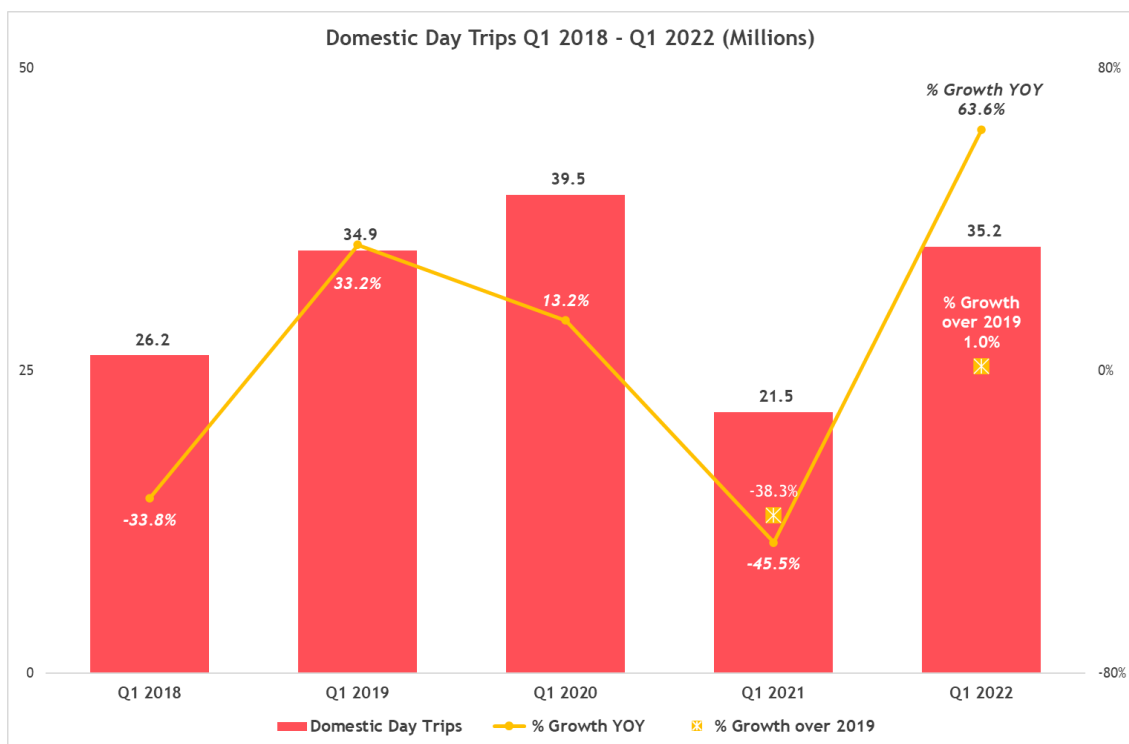
## DAY TRIPS



35.2 MILLION

+1.0% ▲

When compared with Q1 2019, Domestic Day Trips were stagnant and totaled 35.2 million. This is +1.0% over Q1 2019 but +63.6% over Q1 2021. Since this is a return to 2019 levels it signifies a recovery nonetheless. In terms of purpose, all major day trip types went down (Personal Shopping -22.1%, Business -14.3%, Religion -41.0%) with the exception of Holiday which increased by +43.7% over Q1 2019. This change in dynamic must be due to Covid-19's continued impact forcing persons to put off day trips with lower priority.



### Domestic Day Trips by Purpose (Actual Millions, Share & Growth 2019-2022)

**Q1 2019**  
**PERSONAL SHOPPING**  
**10.8m 30.9%**  
**+61.8%**



**Q1 2022**  
**PERSONAL SHOPPING**  
**8.4m 23.9%**  
**-22.1%**

**BUSINESS**  
**3.7m 10.6%**  
**+36.5%**



**BUSINESS**  
**3.2m 9.0%**  
**-14.3%**

**HOLIDAY**  
**5.2m 14.9%**  
**+2.0%**



**HOLIDAY**  
**7.5m 21.2%**  
**+43.7%**

**RELIGIOUS**  
**1.0m 2.8%**  
**+26.8%**



**RELIGIOUS**  
**0.6m 1.6%**  
**-41.0%**



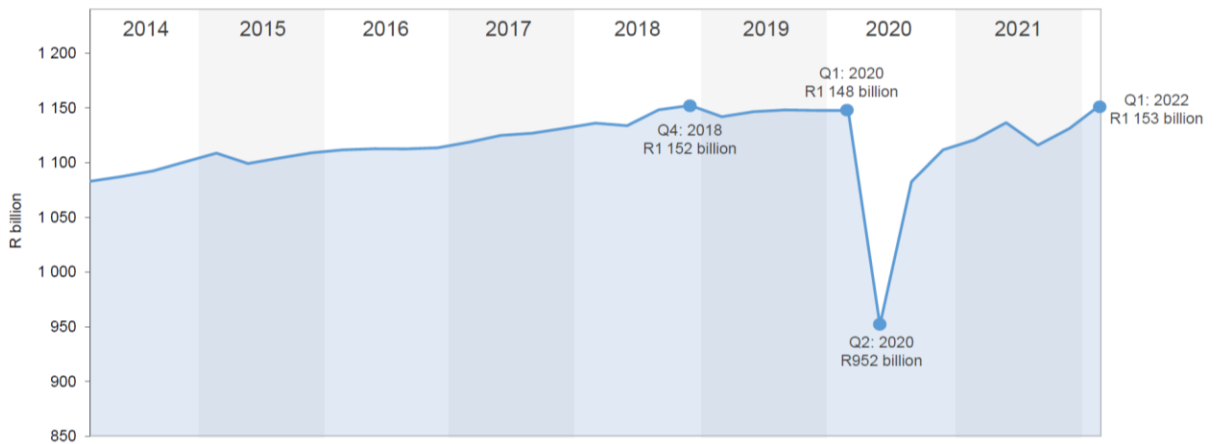


# SOUTH AFRICAN ECONOMY

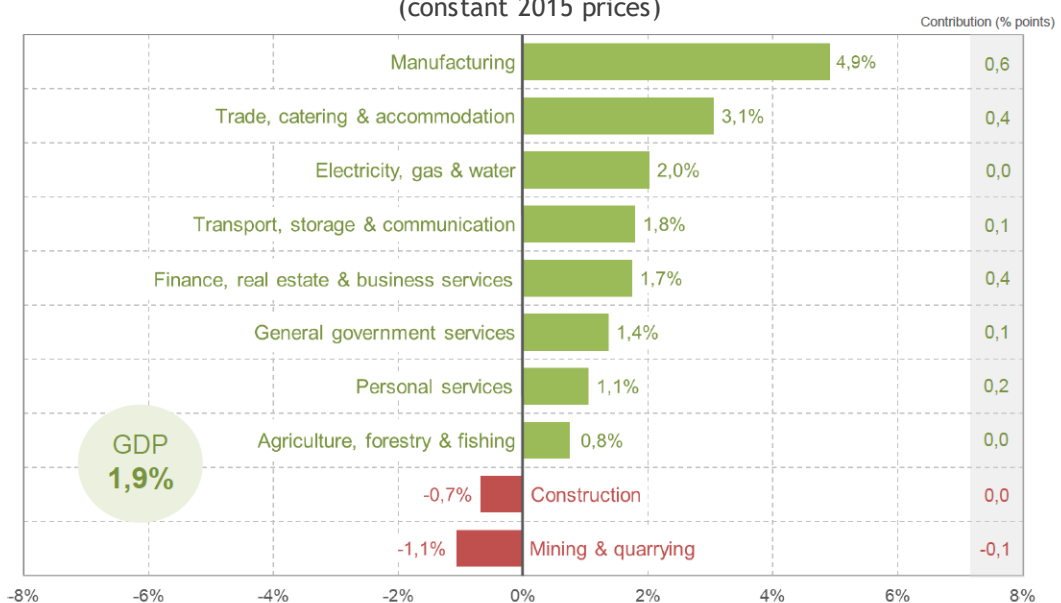


Following a weaker-than-expected third quarter, economic growth for 2021 had been revised down to 4.9% from the 5.1% publicized originally. The downward revision reflected a sharp third-quarter contraction driven by the ‘third wave’ of Covid-19, the outbreak of public violence in KwaZulu-Natal (July 2021), and heightened global uncertainty, as well as modest growth expectations for the fourth quarter following renewed power cuts. Due to improved conditions towards the end of 2021, the National Treasury projected real economic growth of 2.1% in 2022, thus expecting the economy to return to pre-pandemic production levels. The National Treasury also forecast an average annual GDP growth of 1.8% for the next three years.<sup>8</sup> Very much in line with these expectations, the recently published GDP growth rate for Q1 2022 is +1.9%. The manufacturing as well as the trade, catering and accommodation sectors, showed the highest growth rates (+4.9% and +3.1% respectively) and as such also contributed the most towards South Africa’s overall GDP growth rate, contributing 0.6% and 0.4% respectively.<sup>9</sup>

SA Real GDP Q1 2014 - Q1 2022<sup>10</sup>



SA Real GDP Industry Growth Rates Q1 2022 vs. Q4 2021<sup>10</sup>  
(constant 2015 prices)



<sup>8</sup> ‘Economic Outlook’, 2022 Budget Review, The National Treasury of South Africa, 23<sup>rd</sup> February 2022.

<sup>9</sup> ‘GDP Increased by 1.9% in the First Quarter of 2022’, Statistics SA, 7<sup>th</sup> June 2022.

<sup>10</sup> Statistical Release P0441: Gross Domestic Product, 1<sup>st</sup> Quarter 2022, Statistics SA.

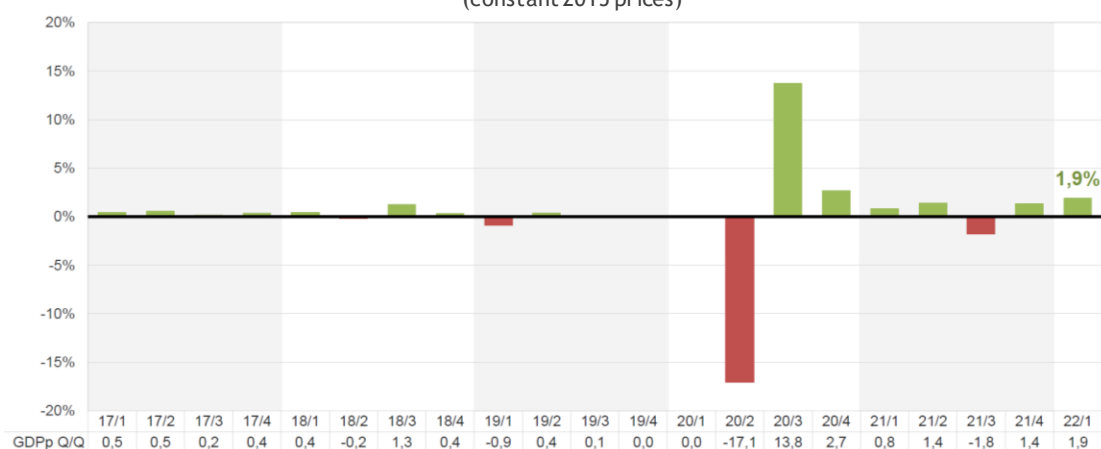


# THE SOUTH AFRICAN ECONOMY

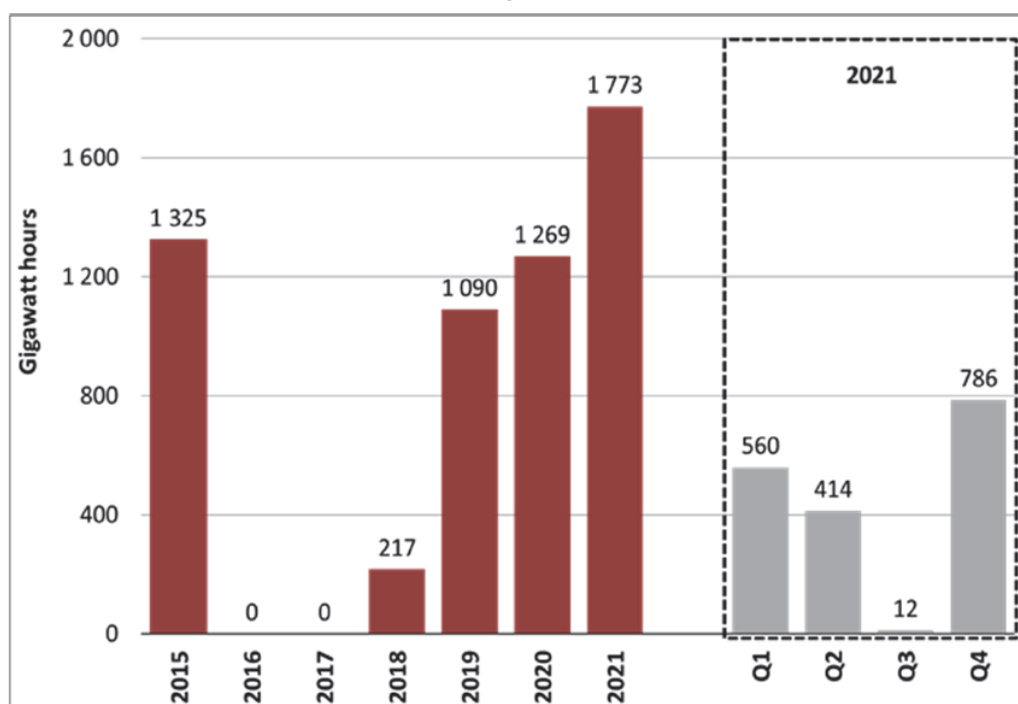
**+1.9%**

During 2021, the economic effects of the pandemic - lost jobs and delayed investments - were further exacerbated by inadequate electricity supply, with the highest levels of load shedding to date. The initial recovery during 2021 was not matched by higher employment or investment, and the slow take-up of vaccinations have left the country vulnerable to new waves of Covid-19 infections. Inadequate electricity supply remains a binding constraint to GDP growth as rising electricity tariffs, illegal connections and ageing infrastructure will continue to weigh on performance. Rising inflation has brought on fiscal risks following faster-than-expected global interest rate increases, especially in the US, which are to have negative consequences for the South African economy. Structural constraints have reduced South Africa's economic growth in the past decade and remain an impediment to future recovery. All of these are further exacerbated by the recent geopolitical uncertainty in the Ukraine and rising fuel prices.<sup>8</sup>

Quarterly SA Real GDP Growth Rate Q1 2017- Q1 2022<sup>10</sup>  
(constant 2015 prices)



Load Shedding in SA 2015-2021<sup>8</sup>

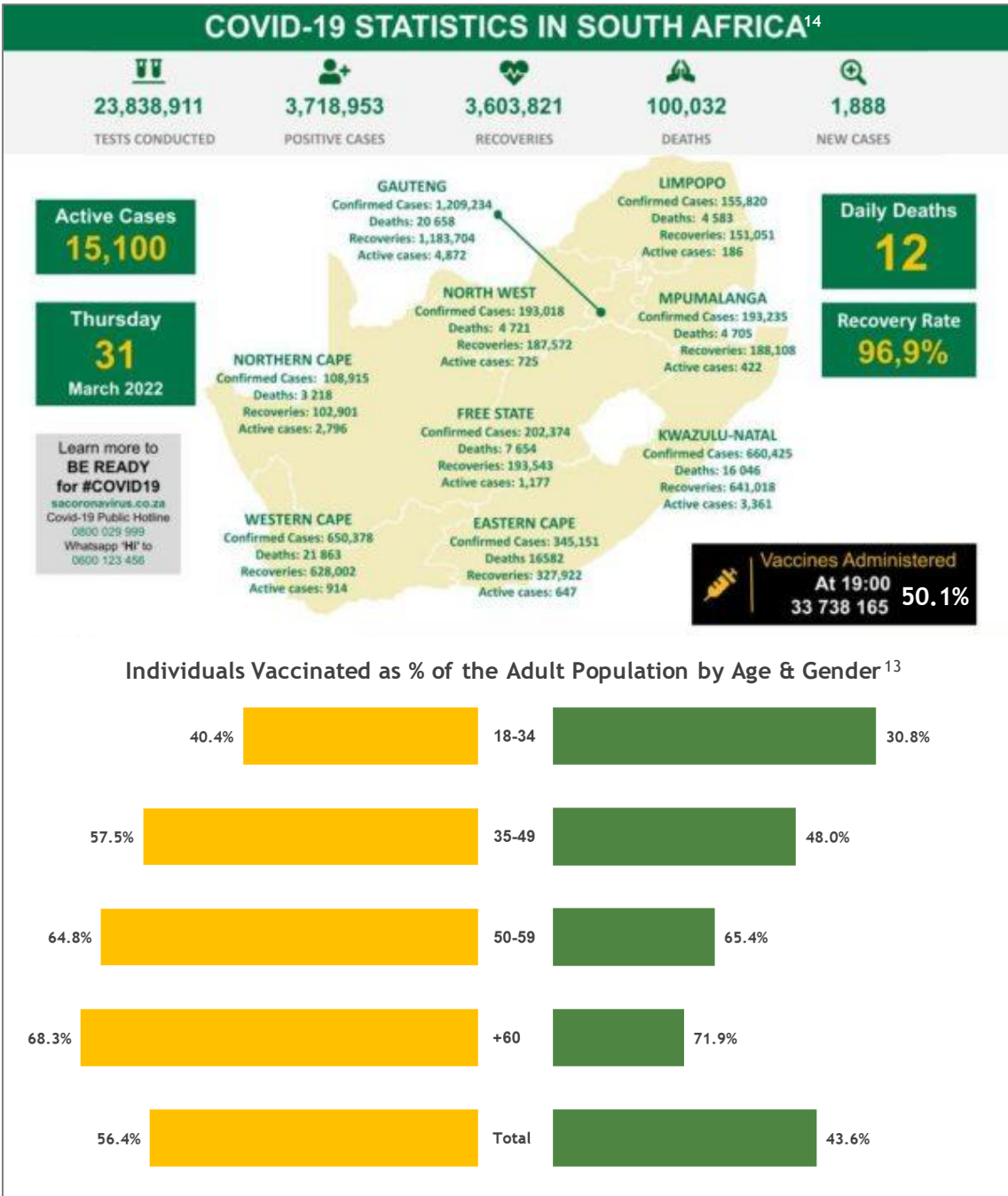


<sup>8</sup> 'Economic Outlook', 2022 Budget Review, The National Treasury of South Africa, 23<sup>rd</sup> February 2022.

<sup>10</sup> Statistical Release P0441: Gross Domestic Product, 1<sup>st</sup> Quarter 2022, Statistics SA.

# COVID-19 IN SOUTH AFRICA

The omicron variant turned out to be highly transmissible but caused fewer hospitalizations. Hence, on 30<sup>th</sup> December 2022, the SA government scrapped the midnight curfew, approved liquor sales (after 11pm) as well as gatherings (1,000 indoors and 2,000 outdoors).<sup>11</sup> A further reduction in hospitalizations and deaths led to the lifting of the National State of Disaster on the 4<sup>th</sup> of April 2022, with President Ramaphosa noting in his speech on 22<sup>nd</sup> March, that some 60 to 80% of the population has some form of immunity to the virus, either from previous infection or vaccination.<sup>12</sup> South Africa is still way short of its target - 70% of the adult population vaccinated, achieving only 50.1% by the 31<sup>st</sup> of March 2022.<sup>13</sup>



<sup>11</sup> Statement by the Cabinet, Union Buildings, Tshwane, 30<sup>th</sup> December 2021.

<sup>12</sup> Statement by the President on Progress in the National Effort to Contain the Covid-19 Pandemic, 22<sup>nd</sup> March 2022.

<sup>13</sup> Latest Vaccine Statistics, Ministry of Health, [sacoronavirus.co.za/latest-vaccine-statistics](https://sacoronavirus.co.za/latest-vaccine-statistics), 31<sup>st</sup> March 2022.

<sup>14</sup> Update on Covid-19, Ministry of Health, [sacoronavirus.co.za](https://sacoronavirus.co.za), 31<sup>st</sup> March 2022.



A woman wearing a black helmet, a black leather jacket, and patterned leggings is riding a black Segway through a shallow stream. She is smiling and looking down at the water. The Segway has large, treaded tires and is splashing water. In the background, a man in a blue t-shirt and brown shorts is also riding a Segway on a rocky path. The scene is set in a lush, green forest with many trees and ferns.

# APPENDIX



A woman wearing a black helmet, a black leather jacket, and patterned leggings is riding a black Segway through a shallow, rocky stream in a lush green forest. She is smiling and looking down at the water. In the background, a man wearing a helmet and a grey t-shirt is also riding a Segway on the same path. The forest is dense with green trees and ferns.

# INTERNATIONAL TOURISTS ARRIVALS



# APPENDIX

INTERNATIONAL TOURIST ARRIVALS				
	Q4 2019	Q4 2020	Q4 2021	% Growth
<b>Africa</b>	<b>1 908 827</b>	<b>312 170</b>	<b>600 353</b>	<b>92,3%</b>
Botswana	194 913	12 368	38 663	212,6%
Lesotho	363 004	35 021	111 725	219,0%
Malawi	52 778	10 040	19 727	96,5%
Mozambique	328 291	77 511	159 207	105,4%
Namibia	49 859	18 413	29 231	58,8%
Swaziland	238 646	25 999	58 493	125,0%
Zambia	38 980	14 827	21 819	47,2%
Zimbabwe	561 608	101 852	128 821	26,5%
Angola	14 160	1 885	3 912	107,5%
Dem Rep of Congo	8 269	2 710	4 770	76,0%
Ethiopia	1 598	563	985	75,0%
Ghana	4 499	1 214	3 499	188,2%
Kenya	8 183	1 252	3 128	149,8%
Nigeria	7 581	2 008	3 784	88,4%
Tanzania	10 484	2 518	4 471	77,6%
Uganda	4 026	559	1 547	176,7%
Other Africa	21 948	3 430	6 571	91,6%
<b>Asia</b>	<b>76 206</b>	<b>7 452</b>	<b>14 344</b>	<b>92,5%</b>
China including Hong Kong	22 445	1 077	1 648	53,0%
India	22 814	1 779	6 403	259,9%
Japan	7 642	292	397	36,0%
Malaysia	1 918	73	138	89,0%
Singapore	2 885	59	91	54,2%
Rep of Korea (South)	4156	275	552	100,7%
Other Asia	14 346	3 897	5 115	31,3%
<b>Australasia</b>	<b>34 877</b>	<b>1 131</b>	<b>2 468</b>	<b>118,2%</b>
Australia	29 150	882	2 063	133,9%
New Zealand	5 640	248	400	61,3%
Other Australasia	87	1	5	400,0%
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>33 133</b>	<b>1 007</b>	<b>4 219</b>	<b>319,0%</b>
Argentina	2 758	112	225	100,9%
Brazil	23 304	522	2 443	368,0%
Chile	1 178	40	139	247,5%
Other Central & South America	5 893	333	1 412	324,0%
<b>Europe</b>	<b>486 371</b>	<b>41 741</b>	<b>124 835</b>	<b>199,1%</b>
Austria	10 143	868	2 408	177,4%
Belgium	16 319	1 718	5 271	206,8%
Denmark	7 523	477	1 960	310,9%
Finland	3 605	239	582	143,5%
France	48 303	3 553	9 846	177,1%
Germany	115 754	7 759	28 488	267,2%
Ireland	9 440	997	2 343	135,0%
Italy	15 793	1 235	2 828	129,0%
Netherlands	43 244	2 996	13 437	348,5%
Norway	5 353	282	1 036	267,4%
Portugal	7 917	921	2 849	209,3%
Russian Fed	5 267	1 102	4 326	292,6%
Spain	9 914	731	2 708	270,5%
Sweden	15 914	1 031	3 089	199,6%
Switzerland	19 960	2 124	7 233	240,5%
Turkey	3 639	642	842	31,2%
UK	130 859	12 485	29 684	137,8%
Other Europe	17 424	2 581	5 905	128,8%
<b>Middle East</b>	<b>14 771</b>	<b>1 540</b>	<b>4 557</b>	<b>195,9%</b>
United Arab Emirates	508	205	107	-47,8%
Other Middle East	14 263	1 335	4 450	233,3%
<b>North America</b>	<b>107 247</b>	<b>7 331</b>	<b>34 247</b>	<b>367,2%</b>
Canada	19 710	1 388	3 857	177,9%
USA	87 537	5 943	30 390	411,4%
<b>UNSPECIFIED</b>	<b>4 418</b>	<b>771</b>	<b>1 565</b>	<b>103,0%</b>
<b>TOTAL</b>	<b>2 665 850</b>	<b>373 143</b>	<b>786 588</b>	<b>110,80%</b>



A woman in a black leather jacket, patterned leggings, and a helmet is riding a Segway through a shallow stream in a lush forest. She is smiling and looking down at the water. In the background, a man in a grey t-shirt and shorts is also riding a Segway. The forest is dense with green trees and ferns. The water in the stream is brown and rocky.

# SPEND IN SOUTH AFRICA



# APPENDIX

TFDS BY COUNTRY				
	Q1 2020	Q1 2021	Q1 2022	% GROWTH
<b>AFRICA</b>	<b>R7 780 063 324</b>	<b>R3 058 677 957</b>	<b>R3 823 026 005</b>	<b>25.0%</b>
Botswana	R461 194 382	R37 150 994	R148 325 934	299.3%
Lesotho	R600 271 547	R390 768 661	R481 913 793	23.3%
Malawi	R539 133 238	R79 911 795	R129 880 312	62.5%
Mozambique	R748 129 781	R2 026 849 463	R820 559 190	-59.5%
Namibia	R198 598 347	R71 015 362	R235 893 583	232.2%
Swaziland	R295 946 187	R26 933 249	R201 764 021	649.1%
Zambia	R572 729 555	R56 393 644	R200 802 498	256.1%
Zimbabwe	R3 238 771 719	R232 817 723	R887 071 719	281.0%
Angola	R240 155 354	R21 981 806	R146 510 991	566.5%
DRC	R148 748 144	R6 799 666	R110 462 637	1524.5%
Ethiopia	R25 352 053	R5 339 802	R14 373 152	169.2%
Ghana	R89 396 952	R10 970 252	R62 630 246	470.9%
Kenya	R66 703 476	R8 528 158	R61 715 518	623.7%
Nigeria	R184 527 229	R22 994 625	R101 254 493	340.3%
Tanzania	R88 685 500	R30 447 064	R54 688 111	79.6%
Uganda	R68 913 594	R3 195 150	R25 699 461	704.3%
Other Africa	R212 806 269	R26 580 545	R139 480 346	424.7%
<b>ASIA</b>	<b>R852 379 562</b>	<b>R116 561 631</b>	<b>R289 713 135</b>	<b>148.5%</b>
China including Hong Kong	R216 590 302	R22 434 371	R25 926 606	15.6%
India	R295 968 412	R45 093 289	R109 597 072	143.0%
Japan	R98 850 900	R8 560 648	R13 666 270	59.6%
Malaysia	R18 189 144	R1 704 931	R4 977 059	191.9%
Singapore	R32 038 866	R2 260 967	R2 525 321	11.7%
South Korea	R73 110 821	R24 084 006	R18 518 394	-23.1%
Other Asia	R116 783 223	R11 840 580	R114 502 412	867.0%
<b>AUSTRALASIA</b>	<b>R485 955 051</b>	<b>R62 669 419</b>	<b>R193 978 575</b>	<b>209.5%</b>
Australia	R410 786 929	R53 475 271	R174 987 945	227.2%
New Zealand	R74 625 570	R9 194 148	R18 691 913	103.3%
Other Australasia	R542 552		R298 717	#DIV/0!
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>R508 250 079</b>	<b>R58 555 125</b>	<b>R112 737 457</b>	<b>92.5%</b>
Argentina	R71 459 083	R7 754 769	R10 012 611	29.1%
Brazil	R339 820 674	R29 804 351	R74 375 437	149.5%
Chile	R32 623 110	R8 388 083	R4 116 483	-50.9%
Other Central & South America	R64 347 212	R12 607 922	R24 232 926	92.2%
<b>EUROPE</b>	<b>R7 874 891 620</b>	<b>R914 971 720</b>	<b>R4 755 925 036</b>	<b>419.8%</b>
Austria	R130 247 941	R13 150 353	R82 084 154	524.2%
Belgium	R228 808 768	R30 085 816	R158 478 130	426.8%
Denmark	R154 433 841	R19 565 128	R96 092 837	391.1%
Finland	R71 404 623	R6 488 045	R18 245 807	181.2%
France	R610 834 892	R89 553 656	R309 387 623	245.5%
Germany	R1 805 925 513	R218 822 359	R1 171 991 934	435.6%
Ireland	R148 016 970	R14 862 822	R91 852 781	518.0%
Italy	R141 702 345	R19 669 624	R104 232 137	429.9%
Netherlands	R727 147 906	R90 083 670	R414 222 182	359.8%
Norway	R81 512 755	R10 625 173	R45 321 103	326.5%
Portugal	R69 798 126	R10 926 792	R42 385 007	287.9%
Russian Fed	R95 641 841	R8 926 936	R80 502 182	801.8%
Spain	R90 453 380	R13 889 174	R68 955 915	396.5%
Sweden	R235 055 925	R19 756 933	R79 480 633	302.3%
Switzerland	R340 389 880	R46 895 433	R241 112 455	414.1%
Turkey	R45 996 666	R3 497 909	R53 258 513	1422.6%
UK	R2 611 317 016	R271 290 211	R1 559 486 080	474.8%
Other Europe	R287 051 130	R27 464 524	R138 835 562	405.5%
<b>MIDDLE EAST</b>	<b>R184 438 917</b>	<b>R23 005 245</b>	<b>R99 553 743</b>	<b>332.7%</b>
UAE	R4 003 526	R2 608 746	R8 114 516	211.1%
Other Middle East	R180 435 391	R20 396 499	R91 439 227	348.3%
<b>NORTH AMERICA</b>	<b>R1 756 679 346</b>	<b>R255 211 638</b>	<b>R1 117 452 503</b>	<b>337.9%</b>
Canada	R336 772 930	R53 361 979	R118 074 612	121.3%
USA	R1 419 906 416	R201 849 659	R999 377 891	395.1%
Other North American	RO	RO	RO	#DIV/0!
<b>TOTAL</b>	<b>R19 442 657 899</b>	<b>R4 489 652 734</b>	<b>R10 392 386 454</b>	<b>131.5%</b>

# APPENDIX

AVERAGE SPEND				
	Q1 2020	Q1 2021	Q1 2022	% GROWTH
<b>AFRICA</b>	<b>R4 400</b>	<b>R9 700</b>	<b>R4 900</b>	<b>-49.5%</b>
Botswana	R4 100	R2 600	R4 000	53.8%
Lesotho	R1 500	R6 100	R2 800	-54.1%
Malawi	R12 400	R9 900	R5 900	-40.4%
Mozambique	R2 200	R22 300	R3 700	-83.4%
Namibia	R5 500	R4 300	R8 400	95.3%
Eswatini	R1 500	R900	R3 000	233.3%
Zambia	R18 100	R4 700	R8 400	78.7%
Zimbabwe	R5 500	R3 100	R5 200	67.7%
Angola	R20 200	R23 500	R29 200	24.3%
DRC	R28 900	R24 900	R34 100	36.9%
Ethiopia	R20 600	R20 300	R16 500	-18.7%
Ghana	R23 500	R21 400	R24 300	13.6%
Kenya	R13 100	R10 500	R17 100	62.9%
Nigeria	R25 000	R21 300	R24 200	13.6%
Tanzania	R21 500	R49 800	R17 200	-65.5%
Uganda	R26 000	R12 700	R16 300	28.3%
Other Africa	R17 200	R16 700	R22 400	34.1%
<b>ASIA</b>	<b>R20 200</b>	<b>R23 000</b>	<b>R21 200</b>	<b>-7.8%</b>
China including Hong Kong	R20 100	R19 500	R21 300	9.2%
India	R20 200	R22 400	R18 000	-19.6%
Japan	R21 300	R14 800	R28 900	95.3%
Malaysia	R14 500	R12 400	R18 200	46.8%
Singapore	R25 200	R25 800	R19 400	-24.8%
South Korea	R21 300	R56 900	R29 900	-47.5%
Other Asia	R18 700	R17 600	R23 500	33.5%
<b>AUSTRALASIA</b>	<b>R22 100</b>	<b>R21 600</b>	<b>R28 000</b>	<b>29.6%</b>
Australia	R22 100	R21 300	R28 700	34.7%
New Zealand	R22 100	R23 800	R23 200	-2.5%
Other Australia	R28 500	R0	R22 900	#DIV/0!
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>R19 000</b>	<b>R18 900</b>	<b>R33 400</b>	<b>76.7%</b>
Argentina	R15 600	R14 900	R27 500	84.6%
Brazil	R19 100	R19 300	R39 700	105.7%
Chile	R22 600	R25 100	R26 200	4.4%
Other Central & South America	R21 900	R17 900	R24 700	38.0%
<b>EUROPE</b>	<b>R21 600</b>	<b>R21 100</b>	<b>R25 900</b>	<b>22.7%</b>
Austria	R16 400	R16 700	R25 400	52.1%
Belgium	R23 100	R18 400	R27 900	51.6%
Denmark	R19 800	R18 800	R28 100	49.5%
Finland	R25 500	R23 600	R20 800	-11.9%
France	R18 900	R17 200	R24 400	41.9%
Germany	R21 000	R22 900	R28 500	24.5%
Ireland	R20 100	R21 300	R21 300	0.0%
Italy	R15 200	R13 600	R29 800	119.1%
The Netherlands	R25 500	R22 300	R24 600	10.3%
Norway	R17 200	R16 600	R24 900	50.0%
Portugal	R18 200	R20 900	R21 800	4.3%
Russian Federation	R19 400	R20 000	R25 900	29.5%
Spain	R17 900	R17 100	R26 500	55.0%
Sweden	R19 100	R19 300	R21 500	11.4%
Switzerland	R27 200	R26 300	R32 300	22.8%
Turkey	R12 200	R14 500	R34 900	140.7%
Uk	R22 800	R22 600	R24 300	7.5%
Other Europe	R24 400	R21 500	R25 500	18.6%
<b>MIDDLE EAST</b>	<b>R20 400</b>	<b>R16 700</b>	<b>R26 800</b>	<b>60.5%</b>
United Arab Emirates	R16 300	R8 000	R42 900	436.3%
Other Middle East	R20 500	R19 300	R26 000	34.7%
<b>NORTH AMERICA</b>	<b>R23 500</b>	<b>R23 400</b>	<b>R29 400</b>	<b>25.6%</b>
Canada	R23 100	R21 800	R23 100	6.0%
USA	R23 600	R23 800	R30 400	27.7%
Other North America	R0	R0	R0	#DIV/0!
<b>TOTAL</b>	<b>R8 400</b>	<b>R11 800</b>	<b>R10 200</b>	<b>-13.6%</b>

# APPENDIX

TFDS BY PURPOSE OF VISIT				
	Q1 2020	Q1 2021	Q1 2022	% Growth 2019-2021
Holiday	R7 078 873 902	R1 339 390 963	3 507 746 571	-50.4%
Personal Shopping	R1 195 894 946	R116 748 482	160 912 537	-86.5%
Business Shopping	R2 458 934 554	R2 127 402 921	463 647 787	-81.1%
Business Traveller	R1 238 441 218	R283 047 726	912 549 178	-26.3%
MICE	R1 021 962 913	R69 675 089	632 489 905	-38.1%
Medical	R345 169 763	R76 834 966	276 151 545	-20.0%
VFR	R4 239 070 465	R182 786 415	3 794 796 891	-10.5%
Religion	R144 987 397	R4 934 721	37 538 280	-74.1%



A woman in a black leather jacket and helmet is riding a Segway through a shallow stream in a lush green forest. She is smiling and looking down at the water. In the background, a man in a grey t-shirt and helmet is also riding a Segway. The water is splashing around the wheels of the Segways. The text "BEDNIGHTS, LENGTH OF STAY & ACCOMMODATION BEDNIGHTS" is overlaid in white capital letters on a dark semi-transparent background.

# BEDNIGHTS, LENGTH OF STAY & ACCOMMODATION BEDNIGHTS



# APPENDIX

BEDNIGHTS BY COUNTRY				
	Q1 2020	Q1 2021	Q1 2022	% GROWTH
<b>AFRICA</b>	<b>15 504 616</b>	<b>2 008 380</b>	<b>7 330 567</b>	<b>265.0%</b>
Botswana	517 753	50 284	170 061	238.2%
Lesotho	5 181 896	540 496	2 232 001	313.0%
Malawi	575 499	101 835	252 897	148.3%
Mozambique	3 977 600	342 312	1 430 552	317.9%
Namibia	402 406	118 767	295 195	148.5%
Eswatini	1 848 569	77 112	483 121	526.5%
Zambia	280 250	126 054	240 146	90.5%
Zimbabwe	1 919 755	585 981	1 701 369	190.3%
Angola	139 888	7 930	86 105	985.8%
DRC	101 706	5 797	75 453	1201.7%
Ethiopia	17 518	2 900	12 094	317.0%
Ghana	60 588	6 156	57 021	826.2%
Kenya	72 125	7 052	28 442	303.3%
Nigeria	100 259	9 337	62 212	566.3%
Tanzania	63 816	6 423	54 973	755.9%
Uganda	41 536	2 699	23 255	761.5%
Other Africa	203 453	17 245	125 669	628.7%
<b>ASIA</b>	<b>947 332</b>	<b>173 131</b>	<b>319 820</b>	<b>84.7%</b>
China including Hong Kong	203 340	18 207	32 225	77.0%
India	418 130	91 858	123 194	34.1%
Japan	86 220	6 095	9 467	55.3%
Malaysia	16 246	1 318	4 378	232.2%
Singapore	16 543	1 415	2 394	69.2%
South Korea	88 915	29 438	17 198	-41.6%
Other Asia	117 939	24 801	130 965	428.1%
<b>AUSTRALASIA</b>	<b>415 958</b>	<b>45 903</b>	<b>150 226</b>	<b>227.3%</b>
Australia	342 373	38 650	128 832	233.3%
New Zealand	73 136	7 254	21 047	190.2%
Other Australia	448	-	347	#DIV/0!
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>476 265</b>	<b>49 183</b>	<b>73 862</b>	<b>50.2%</b>
Argentina	81 374	6 610	6 519	-1.4%
Brazil	299 112	21 448	43 739	103.9%
Chile	26 398	4 895	2 630	-46.3%
Other Central & South America	69 380	16 230	20 973	29.2%
<b>EUROPE</b>	<b>6 651 239</b>	<b>716 514</b>	<b>3 898 091</b>	<b>444.0%</b>
Austria	131 777	12 316	69 565	464.8%
Belgium	222 518	30 199	120 700	299.7%
Denmark	141 871	16 690	63 547	280.8%
Finland	44 613	3 818	15 229	298.9%
France	643 121	78 142	278 862	256.9%
Germany	1 776 615	175 922	926 414	426.6%
Ireland	126 726	11 430	79 698	597.3%
Italy	147 092	17 488	83 905	379.8%
The Netherlands	554 822	67 712	380 925	462.6%
Norway	71 916	7 839	47 285	503.2%
Portugal	68 565	8 272	46 452	461.6%
Russian Federation	97 794	6 848	61 351	795.9%
Spain	78 324	10 265	54 047	426.5%
Sweden	196 446	15 943	80 573	405.4%
Switzerland	230 533	49 815	168 761	238.8%
Turkey	48 171	3 362	30 218	798.9%
Uk	1 871 042	172 566	1 257 193	628.5%
Other Europe	199 294	27 888	133 365	378.2%
<b>MIDDLE EAST</b>	<b>153 601</b>	<b>18 202</b>	<b>80 895</b>	<b>344.4%</b>
United Arab Emirates	2 833	1 767	5 601	217.0%
Other Middle East	150 767	16 436	75 294	358.1%
<b>NORTH AMERICA</b>	<b>1 307 253</b>	<b>149 370</b>	<b>833 695</b>	<b>458.1%</b>
Canada	276 669	37 720	115 437	206.0%
USA	1 030 570	111 650	718 258	543.3%
Other North America	14	-	-	#DIV/0!
<b>TOTAL</b>	<b>25 456 263</b>	<b>3 160 685</b>	<b>12 687 155</b>	<b>301.4%</b>

# APPENDIX

AVERAGE LENGTH OF STAY BY COUNTRY				
	Q1 2020	Q1 2021	Q1 2022	% GROWTH
<b>AFRICA</b>	<b>8.6</b>	<b>6.4</b>	<b>9.5</b>	<b>48.8%</b>
Botswana	4.4	3.6	4.4	22.8%
Lesotho	12.5	8.5	12.9	51.3%
Malawi	13.3	12.7	11.7	-7.9%
Mozambique	11.5	3.7	6.5	73.8%
Namibia	11.2	7.2	10.4	43.7%
Eswatini	9.8	2.7	7.2	164.0%
Zambia	8.9	10.4	10.1	-2.9%
Zimbabwe	3.3	7.9	10.1	28.1%
Angola	11.7	8.3	17.1	106.5%
DRC	19.6	21.2	23.1	8.8%
Ethiopia	13.9	10.9	13.9	27.3%
Ghana	15.7	11.9	22.1	86.2%
Kenya	14.2	8.7	7.9	-9.4%
Nigeria	13.4	8.6	14.8	73.0%
Tanzania	15.0	10.0	17.2	71.6%
Uganda	15.7	10.8	14.6	35.4%
Other Africa	16.3	10.8	20.2	86.1%
<b>ASIA</b>	<b>22.3</b>	<b>34.0</b>	<b>23.3</b>	<b>-31.6%</b>
China including Hong Kong	18.9	15.9	26.6	67.5%
India	28.4	45.1	20.2	-55.3%
Japan	18.6	10.6	19.1	80.0%
Malaysia	13.0	9.6	16.1	66.8%
Singapore	13.1	16.2	18.4	13.9%
South Korea	25.6	69.6	27.0	-61.2%
Other Asia	18.8	36.3	26.9	-26.1%
<b>AUSTRALASIA</b>	<b>19.0</b>	<b>15.9</b>	<b>21.7</b>	<b>36.6%</b>
Australia	18.5	15.4	21.1	36.7%
New Zealand	21.7	18.8	26.1	38.9%
Other Australia	26.4	0.0	26.7	#DIV/0!
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>17.8</b>	<b>15.8</b>	<b>21.9</b>	<b>38.9%</b>
Argentina	17.9	12.8	18.0	40.7%
Brazil	16.7	13.7	23.4	70.2%
Chile	18.3	14.7	16.8	14.1%
Other Central & South America	23.6	23.1	21.4	-7.1%
<b>EUROPE</b>	<b>18.2</b>	<b>16.4</b>	<b>21.2</b>	<b>29.2%</b>
Austria	16.4	15.5	21.4	37.7%
Belgium	22.4	18.5	21.3	15.4%
Denmark	18.2	16.0	18.6	16.2%
Finland	15.9	13.9	17.4	25.0%
France	19.9	15.0	22.1	47.2%
Germany	20.7	18.4	22.5	22.5%
Ireland	17.2	16.4	18.5	12.4%
Italy	15.9	12.1	24.0	98.2%
The Netherlands	19.4	16.7	22.7	36.1%
Norway	15.2	12.3	26.1	112.1%
Portugal	17.8	15.9	23.9	50.6%
Russian Federation	19.7	15.3	19.8	29.4%
Spain	15.5	12.7	20.8	63.7%
Sweden	16.0	15.6	21.9	40.2%
Switzerland	18.5	27.9	22.5	-19.3%
Turkey	12.8	14.0	19.8	41.7%
Uk	16.3	14.3	19.5	36.7%
Other Europe	16.6	21.0	24.6	17.3%
<b>MIDDLE EAST</b>	<b>17.6</b>	<b>13.7</b>	<b>21.8</b>	<b>59.6%</b>
United Arab Emirates	11.6	5.4	29.6	444.9%
Other Middle East	17.7	16.4	21.4	31.0%
<b>NORTH AMERICA</b>	<b>17.5</b>	<b>13.7</b>	<b>21.9</b>	<b>60.3%</b>
Canada	19.0	15.5	22.6	46.1%
USA	17.1	13.2	21.8	65.7%
Other North America	14.0	0.0	0.0	#DIV/0!
<b>TOTAL</b>	<b>10.8</b>	<b>8.3</b>	<b>12.4</b>	<b>50.0%</b>

# APPENDIX

ACCOMMODATION TYPE - BEDNIGHTS									
Q1 2022									
	Hotels	Guest House	BnB	Self Catering	Game Lodge	Backpacker	Camping	Friends & Family	Air B&B
<b>AFRICA</b>	<b>380245</b>	<b>178960</b>	<b>48842</b>	<b>176500</b>	<b>48816</b>	<b>72776</b>	<b>15546</b>	<b>4931648</b>	<b>0</b>
Botswana	19456	11498	3062	4692	4503	216	0	85974	0
Lesotho	52524	20833	6156	64552	11107	56513	1027	1946975	0
Malawi	29429	3412	0	405	3923	0	4159	42094	0
Mozambique	44666	20264	0	2804	30	851	2583	1343449	0
Namibia	27754	18827	7686	30766	686	0	496	188860	0
Eswatini	17435	14923	6573	7836	3962	10963	0	378026	0
Zambia	22972	2662	119	237	3202	119	0	56941	0
Zimbabwe	75420	57046	12835	16640	14236	0	6089	595619	0
Angola	14716	11137	597	11566	360	164	0	46945	0
DRC	9970	2391	1492	16700	103	0	0	44556	0
Ethiopia	3066	262	217	113	24	0	36	7545	0
Ghana	6727	2435	6217	5777	314	3773	692	27449	0
Kenya	11096	2466	652	289	293	0	67	12648	0
Nigeria	14826	2799	520	1305	599	0	164	32904	0
Tanzania	7830	1517	1561	3587	0	0	0	36885	0
Uganda	3513	171	0	0	2610	140	0	15951	0
Other Africa	18844	6318	1156	9230	2863	36	232	68828	0
<b>ASIA</b>	<b>60907</b>	<b>5317</b>	<b>3332</b>	<b>19533</b>	<b>3157</b>	<b>3021</b>	<b>14404</b>	<b>198340</b>	<b>0</b>
China including Hong Kong	6100	437	213	4936	417	160	0	19615	0
India	30291	3423	835	11135	2178	2538	863	64884	0
Japan	1779	732	397	752	60	8	0	5531	0
Malaysia	1125	0	131	0	123	315	0	2668	0
Singapore	327	34	0	0	77	0	18	1739	0
South Korea	2468	181	445	557	37	0	19	13439	0
Other Asia	18818	510	1311	2153	266	0	13504	90464	0
<b>AUSTRALASIA</b>	<b>11733</b>	<b>4457</b>	<b>2140</b>	<b>7562</b>	<b>6096</b>	<b>223</b>	<b>0</b>	<b>108875</b>	<b>0</b>
Australia	10114	3993	1950	7319	5843	152	0	91678	0
New Zealand	1613	464	190	243	253	70	0	16860	0
Other Australia	7	0	0	0	0	0	0	337	0
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>10507</b>	<b>4737</b>	<b>472</b>	<b>7126</b>	<b>2638</b>	<b>2588</b>	<b>1367</b>	<b>42083</b>	<b>0</b>
Argentina	1148	324	78	0	161	49	123	2796	0
Brazil	6125	2685	291	5680	1302	330	855	26406	0
Chile	364	181	104	0	284	0	10	1619	0
Other Central & South America	2870	1548	0	1446	890	2210	380	11261	0
<b>EUROPE</b>	<b>576972</b>	<b>330678</b>	<b>142172</b>	<b>226832</b>	<b>212840</b>	<b>44557</b>	<b>33516</b>	<b>2032262</b>	<b>0</b>
Austria	14990	2808	1606	980	2111	627	783	44311	0
Belgium	23236	13428	4414	1816	12012	4196	1066	47443	0
Denmark	6421	4473	1513	3601	11985	1574	1359	30606	0
Finland	2993	344	23	1670	317	0	0	6278	0
France	53575	27526	2958	20951	20936	5045	1202	127099	0
Germany	149322	125923	49815	59615	62116	15954	14636	340681	0
Ireland	11650	1674	1412	4416	1795	96	912	52914	0
Italy	13275	7114	1329	6607	2551	2425	402	44688	0
The Netherlands	39334	34413	14508	28578	26111	4710	3658	205832	0
Norway	7496	6705	209	3344	1091	610	0	23054	0
Portugal	9375	1641	1830	3779	567	403	0	28016	0
Russian Federation	13896	5392	132	4182	2612	1347	230	27575	0
Spain	6969	3431	2374	1496	3415	1576	611	28852	0
Sweden	11369	3043	2999	13018	5225	849	781	36755	0
Switzerland	21415	24770	8446	18239	11703	1420	3241	65512	0
Turkey	8321	937	264	0	538	181	0	19252	0
Uk	161600	57977	41862	47563	42178	3381	3747	826419	0
Other Europe	21735	9080	6478	6977	5577	160	889	76975	0
<b>MIDDLE EAST</b>	<b>9745</b>	<b>5993</b>	<b>548</b>	<b>354</b>	<b>2209</b>	<b>3449</b>	<b>442</b>	<b>54802</b>	<b>0</b>
United Arab Emirates	214	1295	0	15	46	0	0	4031	0
Other Middle East	9531	4698	548	340	2163	3449	442	50771	0
<b>NORTH AMERICA</b>	<b>98338</b>	<b>49787</b>	<b>19362</b>	<b>19383</b>	<b>46756</b>	<b>2002</b>	<b>7409</b>	<b>540955</b>	<b>0</b>
Canada	9971	6383	3111	4396	7450	303	40	74687	0
USA	88367	43404	16251	14987	39306	1699	7370	466268	0
Other North America	0	0	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>1148447</b>	<b>579930</b>	<b>216869</b>	<b>457290</b>	<b>322511</b>	<b>128615</b>	<b>72685</b>	<b>7908964</b>	<b>0</b>

# APPENDIX

ACCOMMODATION TYPE - BEDNIGHTS									
Q1 2021									
	Hotels	Guest House	BnB	Self Catering	Game Lodge	Backpacker	Camping	Friends & Family	Air B&B
<b>AFRICA</b>	<b>95913</b>	<b>75032</b>	<b>6133</b>	<b>31338</b>	<b>8516</b>	<b>36920</b>	<b>8184</b>	<b>810224</b>	<b>2843</b>
Botswana	3282	1567	339	517	1576	12	3931	21769	43
Lesotho	11308	25421	2517	15109	741	31479	141	382636	0
Malawi	5874	178	153	469	444	333	0	19819	197
Mozambique	25045	14330	372	1350	696	2168	1277	237586	5
Namibia	10223	16102	692	2623	392	249	226	66074	236
Eswatini	2085	3766	242	54	1635	110	0	20981	0
Zambia	5273	1763	30	2831	92	191	144	4895	16
Zimbabwe	6475	4731	641	2614	1379	572	2403	40825	555
Angola	3724	1640	109	127	62	29	0	1571	280
DRC	800	798	202	786	19	0	0	3178	0
Ethiopia	1055	190	40	110	110	0	0	323	526
Ghana	2661	590	29	972	0	0	18	1887	0
Kenya	2521	1278	201	470	4	361	0	1389	160
Nigeria	4772	572	25	1083	91	179	0	1370	425
Tanzania	2283	73	420	1288	299	552	0	1036	30
Uganda	869	355	7	31	0	25	0	437	175
Other Africa	7663	1680	113	903	976	659	43	4448	195
<b>ASIA</b>	<b>27868</b>	<b>27627</b>	<b>1220</b>	<b>5044</b>	<b>2796</b>	<b>2220</b>	<b>964</b>	<b>18237</b>	<b>27980</b>
China including Hong Kong	6285	471	558	741	999	178	446	7807	362
India	13706	10995	194	3059	755	769	31	3195	2553
Japan	2083	938	175	79	533	127	72	878	244
Malaysia	502	0	28	21	31	335	186	65	62
Singapore	630	46	0	1	0	0	21	633	81
South Korea	2545	259	131	281	111	438	0	1645	24027
Other Asia	2117	14918	134	863	367	373	207	4014	651
<b>AUSTRALASIA</b>	<b>9974</b>	<b>1805</b>	<b>842</b>	<b>2057</b>	<b>5493</b>	<b>1817</b>	<b>968</b>	<b>14920</b>	<b>3518</b>
Australia	9301	1585	725	1691	4443	1807	957	10753	3172
New Zealand	673	220	117	366	1050	10	11	4166	346
Other Australia	0	0	0	0	0	0	0	0	0
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>26419</b>	<b>2859</b>	<b>1755</b>	<b>608</b>	<b>3394</b>	<b>5195</b>	<b>413</b>	<b>3534</b>	<b>2266</b>
Argentina	2954	518	289	3	783	723	93	364	427
Brazil	9807	1130	1125	396	1820	2566	207	2051	1195
Chile	1571	307	134	208	495	1184	21	141	272
Other Central & South America	12087	904	207	0	296	722	93	978	371
<b>EUROPE</b>	<b>232073</b>	<b>93008</b>	<b>31880</b>	<b>52184</b>	<b>83729</b>	<b>29126</b>	<b>13591</b>	<b>99767</b>	<b>50054</b>
Austria	4177	1423	650	183	962	398	347	1072	517
Belgium	7044	3368	778	1370	9469	837	401	3361	1808
Denmark	5733	1466	589	319	3370	229	82	4200	596
Finland	1549	74	562	0	144	143	0	237	497
France	28838	7512	1389	3715	10155	3568	1131	11805	5539
Germany	46789	23515	12711	19400	18503	11165	3794	17439	17172
Ireland	3981	1158	501	1173	580	10	94	2328	932
Italy	6395	2298	958	495	2552	104	172	3129	1254
The Netherlands	18722	7894	3016	3761	13084	3536	2204	8426	4215
Norway	2589	880	185	289	1235	890	113	1013	2
Portugal	2873	586	99	144	433	232	64	2933	416
Russian Federation	2525	1290	131	227	203	277	31	1007	733
Spain	2745	1601	267	61	1239	1075	155	2443	557
Sweden	5935	1603	382	962	1916	674	241	1825	1705
Switzerland	16682	18296	1725	1530	2905	1204	1742	2908	1578
Turkey	1026	757	41	206	196	0	0	409	54
Uk	60448	16954	6894	16359	15270	4433	2550	30574	11238
Other Europe	14021	2333	1001	1990	1511	351	468	4658	1241
<b>MIDDLE EAST</b>	<b>6160</b>	<b>1123</b>	<b>1413</b>	<b>224</b>	<b>801</b>	<b>1640</b>	<b>11</b>	<b>5522</b>	<b>528</b>
United Arab Emirates	863	233	31	0	6	0	0	495	0
Other Middle East	5297	891	1382	223	795	1640	11	5028	528
<b>NORTH AMERICA</b>	<b>53455</b>	<b>13027</b>	<b>5112</b>	<b>10664</b>	<b>16854</b>	<b>7805</b>	<b>3736</b>	<b>21580</b>	<b>11767</b>
Canada	11031	5838	1669	1154	4287	4028	1556	3775	3848
USA	42424	7189	3442	9510	12567	3777	2180	17805	7919
Other North America	0	0	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>451862</b>	<b>214481</b>	<b>48354</b>	<b>102118</b>	<b>121583</b>	<b>84723</b>	<b>27866</b>	<b>973785</b>	<b>98955</b>

# APPENDIX

ACCOMMODATION TYPE - BEDNIGHTS									
Q1 2020									
	Hotels	Guest House	BnB	Self Catering	Game Lodge	Backpacker	Camping	Friends & Family	Air B&B
<b>AFRICA</b>	<b>593469</b>	<b>263683</b>	<b>44066</b>	<b>249964</b>	<b>93045</b>	<b>130566</b>	<b>29023</b>	<b>12420050</b>	<b>20515</b>
Botswana	36996	17226	7378	11828	10876	1500	3339	362500	1331
Lesotho	45538	31290	3642	19314	18843	61085		4236675	
Malawi	78497	8028	1290	9343	7322	5013		425066	854
Mozambique	39228	36916	2458	6672	4753	3884		3841497	153
Namibia	28145	20276	5011	50245	3114	11221		154590	2207
Eswatini	30281	6900	4033	2261	12923	1095	2666	1767479	
Zambia	85549	17906	446	9211	3096	9074	21877	112308	348
Zimbabwe	61340	40558	10924	55841	24821	5518	504	1215975	6655
Angola	38683	22495	1066	3462	287	1091		56759	1747
DRC	8787	17277	1752	18578	348			53462	
Ethiopia	4343	542	99	1623	775			5687	640
Ghana	16862	2280	435	12617			245	28149	
Kenya	17319	13353	851	5230	65	5103		18905	1450
Nigeria	29683	3678	292	13651	379	3645		26611	3734
Tanzania	10503	809	3516	11842	848	8595		20672	312
Uganda	6632	4666	98	366		338		14655	469
Other Africa	55084	19482	778	17880	4594	13403	393	79060	616
<b>ASIA</b>	<b>191445</b>	<b>69619</b>	<b>7591</b>	<b>79643</b>	<b>16122</b>	<b>30779</b>	<b>6011</b>	<b>381097</b>	<b>43283</b>
China including Hong Kong	40622	7533	1229	12025	5169	1466	3225	120429	7220
India	101222	39938	2768	56196	3194	13159	167	97160	16009
Japan	16278	8628	1219	2085	3080	1456	335	33230	2697
Malaysia	3884		730	145	121	4380	1140	3540	337
Singapore	6287	825		140			338	6410	2434
South Korea	10975	2172	1075	4187	2362	9118	145	46783	12099
Other Asia	12177	10104	569	4866	2197	1201	662	73545	2486
<b>AUSTRALASIA</b>	<b>51601</b>	<b>14358</b>	<b>8414</b>	<b>14912</b>	<b>30346</b>	<b>9079</b>	<b>5513</b>	<b>244059</b>	<b>23986</b>
Australia	47370	12098	7692	12521	26053	9033	5332	193897	18860
New Zealand	4018	2261	721	2391	4290	31	181	49924	5127
Other Australia	213				3	15		238	
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>141870</b>	<b>51021</b>	<b>20559</b>	<b>12487</b>	<b>27835</b>	<b>45680</b>	<b>4946</b>	<b>105796</b>	<b>23197</b>
Argentina	22337	9191	1950	93	6177	4751	602	17229	7604
Brazil	98534	35843	17363	9635	18413	31533	3809	44443	12693
Chile	6938	1135	378	2759	1520	5179	58	4789	1359
Other Central & South America	14060	4852	867		1725	4217	477	39335	1540
<b>EUROPE</b>	<b>1543668</b>	<b>649982</b>	<b>241612</b>	<b>460720</b>	<b>588082</b>	<b>249420</b>	<b>121981</b>	<b>1839378</b>	<b>426540</b>
Austria	37616	13670	6191	4388	11605	3322	7525	31521	7023
Belgium	38661	34892	3812	23163	31018	7082	6900	38178	11043
Denmark	25821	12343	3799	7020	32241	7491	500	42191	6851
Finland	17978	1270	8248		1054	1190		4126	4128
France	160654	55946	8827	68846	64886	34292	6363	131508	42763
Germany	351788	220375	88427	131405	165045	100791	32211	347471	152768
Ireland	31854	10509	4780	7572	5208	58	978	51235	6566
Italy	41813	12269	5477	4112	17783	4670	1244	34181	5798
The Netherlands	112941	51496	14768	51558	80873	31855	15678	131798	34737
Norway	15694	6017	1511	2010	6531	4898	670	15359	738
Portugal	14766	6044	1015	2696	1386	2231	550	30235	2328
Russian Federation	22910	8534	1359	1385	2565	2772	200	38550	4721
Spain	14414	13793	1277	843	5609	5729	727	25466	3813
Sweden	55520	20965	4404	12216	16994	5514	4224	53589	15332
Switzerland	45316	23815	12227	12601	17530	7502	12881	56571	14198
Turkey	15719	5201	486	1040	1078			18017	1277
Uk	485341	133045	66801	114688	112210	27797	25373	729517	102482
Other Europe	54861	20217	8205	15177	14465	2224	5957	59866	9973
<b>MIDDLE EAST</b>	<b>28154</b>	<b>13949</b>	<b>5674</b>	<b>7169</b>	<b>5976</b>	<b>8438</b>	<b>71</b>	<b>70705</b>	<b>3742</b>
United Arab Emirates	621	311	16	8	8			1525	
Other Middle East	27533	13639	5659	7162	5968	8438	71	69180	3742
<b>NORTH AMERICA</b>	<b>285964</b>	<b>94735</b>	<b>45795</b>	<b>94951</b>	<b>89169</b>	<b>48293</b>	<b>20937</b>	<b>445335</b>	<b>76163</b>
Canada	51954	33289	18963	10982	21245	16351	7608	86136	21003
USA	234009	61446	26832	83968	67925	31941	13329	359200	55160
Other North America									
<b>TOTAL</b>	<b>2836171</b>	<b>1157347</b>	<b>373710</b>	<b>919846</b>	<b>850575</b>	<b>522255</b>	<b>188481</b>	<b>15506420</b>	<b>617425</b>



A woman in a black leather jacket, patterned leggings, and a helmet is riding a Segway through a shallow, rocky stream in a lush forest. She is smiling and looking down at the water. In the background, a man wearing a helmet and a t-shirt is also riding a Segway on the same path. The forest is dense with green trees and ferns.

# PURPOSE OF VISIT



# APPENDIX

PURPOSE OF VISIT (CATEGORIES)									
Q1 2022									
	Holiday	Shopping personal	Shopping business	Business traveller	MICE	Medical	VFR	Religion	Other
<b>AFRICA</b>	<b>7.1%</b>	<b>4.4%</b>	<b>15.5%</b>	<b>15.0%</b>	<b>2.1%</b>	<b>2.1%</b>	<b>43.1%</b>	<b>0.6%</b>	<b>10.1%</b>
Botswana	9%	2%	24%	24%	3%	2%	19%	1%	16%
Lesotho	2%	1%	2%	2%	1%	2%	63%	1%	26%
Malawi	2%	0%	57%	21%	4%	1%	9%	0%	6%
Mozambique	9%	13%	8%	0%	0%	3%	64%	0%	1%
Namibia	15%	0%	2%	15%	5%	3%	42%	1%	17%
Eswatini	12%	1%	23%	9%	1%	1%	43%	2%	8%
Zambia	4%	0%	22%	52%	5%	1%	12%	1%	4%
Zimbabwe	4%	1%	33%	43%	3%	1%	11%	0%	4%
Angola	21%	2%	1%	8%	10%	20%	29%	0%	10%
DRC	16%	1%	3%	13%	7%	6%	41%	0%	14%
Ethiopia	18%	0%	0%	15%	15%	2%	30%	0%	19%
Ghana	28%	0%	1%	6%	13%	1%	34%	1%	15%
Kenya	15%	1%	0%	14%	22%	0%	21%	0%	26%
Nigeria	22%	0%	0%	20%	14%	0%	29%	1%	13%
Tanzania	18%	0%	3%	9%	16%	2%	31%	0%	20%
Uganda	17%	2%	0%	11%	8%	1%	38%	0%	23%
Other Africa	17%	1%	0%	14%	7%	5%	38%	1%	16%
<b>ASIA</b>	<b>19.5%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>22.4%</b>	<b>15.3%</b>	<b>0.3%</b>	<b>32.0%</b>	<b>0.0%</b>	<b>10.6%</b>
China including Hong Kong	27%	0%	0%	16%	21%	0%	30%	0%	7%
India	16%	0%	0%	18%	16%	1%	34%	0%	16%
Japan	14%	0%	0%	20%	19%	0%	37%	1%	10%
Malaysia	26%	0%	0%	9%	14%	0%	44%	0%	7%
Singapore	8%	0%	2%	13%	26%	0%	51%	0%	0%
South Korea	13%	0%	0%	19%	12%	0%	50%	0%	6%
Other Asia	23%	0%	0%	31%	14%	0%	27%	0%	6%
<b>AUSTRALASIA</b>	<b>21.2%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>4.9%</b>	<b>3.9%</b>	<b>1.2%</b>	<b>63.8%</b>	<b>0.1%</b>	<b>4.7%</b>
Australia	21%	0%	0%	5%	4%	1%	64%	0%	5%
New Zealand	21%	0%	0%	2%	4%	0%	66%	1%	6%
Other Australia	23%	0%	0%	0%	15%	0%	62%	0%	0%
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>31.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>11.5%</b>	<b>8.0%</b>	<b>0.9%</b>	<b>42.1%</b>	<b>0.0%</b>	<b>6.2%</b>
Argentina	31%	0%	0%	21%	10%	0%	37%	0%	2%
Brazil	21%	0%	0%	11%	9%	2%	49%	0%	9%
Chile	47%	0%	0%	6%	6%	0%	41%	0%	0%
Other Central & South America	48%	0%	0%	10%	7%	0%	31%	0%	4%
<b>EUROPE</b>	<b>43.5%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>6.6%</b>	<b>7.2%</b>	<b>0.3%</b>	<b>38.0%</b>	<b>0.1%</b>	<b>4.2%</b>
Austria	34%	0%	0%	7%	9%	0%	46%	0%	3%
Belgium	47%	0%	1%	7%	9%	1%	32%	0%	3%
Denmark	52%	1%	0%	5%	5%	0%	27%	0%	10%
Finland	49%	0%	0%	4%	11%	0%	31%	0%	5%
France	47%	0%	1%	5%	13%	1%	30%	0%	4%
Germany	53%	0%	0%	8%	8%	0%	25%	0%	5%
Ireland	34%	0%	0%	5%	5%	0%	52%	0%	4%
Italy	42%	0%	0%	12%	10%	1%	29%	0%	6%
The Netherlands	46%	0%	0%	7%	6%	0%	37%	0%	3%
Norway	43%	0%	0%	14%	7%	0%	32%	2%	2%
Portugal	41%	2%	0%	12%	5%	2%	34%	0%	4%
Russian Federation	50%	0%	0%	15%	10%	0%	23%	0%	3%
Spain	43%	0%	0%	11%	18%	0%	27%	0%	1%
Sweden	45%	0%	0%	5%	10%	0%	33%	0%	7%
Switzerland	59%	0%	0%	6%	8%	0%	23%	0%	5%
Turkey	49%	0%	0%	17%	6%	0%	25%	0%	2%
Uk	35%	0%	0%	4%	5%	0%	52%	0%	3%
Other Europe	33%	0%	0%	14%	12%	0%	32%	0%	8%
<b>MIDDLE EAST</b>	<b>25.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>8.2%</b>	<b>6.4%</b>	<b>0.9%</b>	<b>56.3%</b>	<b>0.0%</b>	<b>3.1%</b>
United Arab Emirates	5%	0%	0%	8%	4%	0%	68%	0%	15%
Other Middle East	26%	0%	0%	8%	7%	1%	56%	0%	2%
<b>NORTH AMERICA</b>	<b>42.8%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>5.1%</b>	<b>6.2%</b>	<b>0.6%</b>	<b>39.1%</b>	<b>1.0%</b>	<b>5.2%</b>
Canada	35%	0%	0%	4%	6%	0%	51%	0%	4%
USA	44%	0%	0%	5%	6%	1%	37%	1%	5%
Other North America	0%	0%	0%	0%	0%	0%	0%	0%	0%
<b>TOTAL</b>	<b>15.3%</b>	<b>3.4%</b>	<b>11.8%</b>	<b>13.2%</b>	<b>3.4%</b>	<b>1.7%</b>	<b>42.0%</b>	<b>0.5%</b>	<b>8.8%</b>

# APPENDIX

PURPOSE OF VISIT ( CATEGORIES)									
Q1 2021									
	Holiday	Shopping personal	Shopping business	Business traveller	MICE	Medical	VFR	Religion	Other
<b>AFRICA</b>	5.2%	4.6%	36.4%	30.0%	1.3%	2.6%	12.6%	0.3%	7.1%
Botswana	3.7%	1.1%	34.7%	34.6%	1.9%	0.3%	8.4%	0.2%	15.2%
Lesotho	0.5%	1.2%	24.5%	33.2%	1.3%	2.8%	19.7%	0.9%	15.9%
Malawi	1.2%	0.6%	52.7%	35.3%	1.8%	0.2%	1.1%	0.1%	7.1%
Mozambique	11.1%	13.3%	44.6%	1.2%	0.3%	5.8%	20.6%	0.0%	3.2%
Namibia	7.2%	0.3%	11.3%	30.5%	2.6%	3.8%	24.7%	0.1%	19.6%
Swaziland	1.6%	0.8%	39.3%	44.6%	0.9%	0.9%	8.6%	0.8%	2.5%
Zambia	2.1%	1.9%	45.0%	43.9%	1.5%	0.3%	0.1%	0.2%	5.0%
Zimbabwe	0.9%	0.8%	40.7%	55.2%	0.8%	0.1%	0.5%	0.0%	0.9%
Angola	59.7%	7.1%	2.6%	8.3%	7.0%	5.9%	1.2%	0.2%	8.1%
Democratic Republic of Congo	64.2%	0.0%	0.0%	8.9%	12.5%	6.0%	2.8%	1.5%	4.1%
Ethiopia	38.9%	0.0%	9.4%	9.2%	29.2%	1.8%	1.1%	1.5%	8.9%
Ghana	57.8%	0.0%	9.6%	4.7%	16.3%	0.9%	1.5%	0.8%	8.3%
Kenya	23.1%	5.6%	0.0%	13.6%	22.6%	0.6%	0.7%	2.0%	31.8%
Nigeria	40.7%	0.0%	0.0%	15.1%	19.6%	0.4%	0.9%	0.9%	22.3%
Tanzania	30.6%	0.0%	7.8%	7.6%	14.0%	0.7%	1.3%	1.6%	36.4%
Uganda	37.0%	0.0%	0.0%	13.4%	32.2%	0.9%	1.4%	2.4%	12.6%
Other Africa	46.7%	4.3%	1.6%	7.1%	10.6%	0.6%	1.1%	0.9%	27.2%
<b>ASIA</b>	57.6%	0.0%	0.5%	7.0%	8.2%	0.1%	1.3%	0.3%	25.0%
China including Hong Kong	79.1%	0.0%	0.0%	8.0%	8.9%	0.6%	2.2%	0.2%	1.1%
India	37.0%	0.0%	0.0%	9.6%	9.4%	0.0%	0.6%	0.2%	43.2%
Japan	83.0%	0.0%	4.3%	4.8%	5.1%	0.0%	1.0%	0.0%	1.8%
Malaysia	90.6%	0.0%	0.0%	2.2%	0.0%	0.0%	0.7%	1.5%	5.1%
Singapore	48.7%	0.0%	0.0%	10.4%	35.3%	0.0%	1.3%	2.3%	1.9%
South Korea	53.7%	0.0%	0.0%	0.7%	1.5%	0.0%	2.1%	0.5%	41.6%
Other Asia	57.4%	0.0%	0.0%	4.0%	8.2%	0.0%	2.1%	0.3%	27.9%
<b>AUSTRALASIA</b>	83.3%	0.8%	0.0%	2.8%	2.5%	0.2%	2.7%	0.2%	7.5%
Australia	83.2%	0.9%	0.0%	2.9%	2.0%	0.2%	2.4%	0.2%	8.1%
New Zealand	83.4%	0.0%	0.0%	2.4%	5.7%	0.6%	5.0%	0.0%	3.0%
Other Australasia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>CENTRAL &amp; SOUTH AMERICA</b>	80.1%	0.0%	0.8%	2.1%	3.2%	0.0%	0.2%	0.1%	13.5%
Argentina	89.6%	0.0%	0.0%	2.9%	3.9%	0.0%	0.3%	0.4%	2.8%
Brazil	90.5%	0.0%	1.6%	1.2%	3.9%	0.0%	0.2%	0.0%	2.7%
Chile	89.7%	0.0%	0.0%	4.6%	1.0%	0.0%	0.4%	0.0%	4.4%
Other Central & South America	45.5%	0.0%	0.0%	2.2%	2.4%	0.0%	0.2%	0.0%	49.7%
<b>EUROPE</b>	82.4%	0.1%	0.2%	3.0%	2.5%	0.1%	0.8%	0.1%	10.9%
Austria	72.8%	0.0%	0.0%	2.7%	1.6%	0.3%	0.7%	0.0%	21.9%
Belgium	71.4%	0.0%	0.0%	3.4%	2.1%	0.0%	0.4%	0.0%	22.8%
Denmark	79.6%	0.0%	0.0%	0.9%	1.3%	0.0%	0.4%	0.0%	17.7%
Finland	86.6%	0.0%	0.0%	5.6%	5.6%	0.0%	0.2%	0.0%	2.0%
France	81.3%	0.0%	0.5%	1.7%	2.1%	0.1%	0.3%	0.0%	14.0%
Germany	82.4%	0.2%	0.0%	3.0%	2.0%	0.0%	0.5%	0.1%	11.8%
Ireland	92.0%	0.0%	0.0%	2.6%	3.1%	0.0%	1.5%	0.0%	0.8%
Italy	75.0%	0.0%	0.0%	6.5%	5.6%	0.0%	0.3%	0.0%	12.6%
Netherlands	89.2%	0.0%	0.0%	2.8%	1.6%	0.2%	0.7%	0.2%	5.3%
Norway	90.5%	0.0%	3.9%	1.9%	1.2%	0.0%	1.0%	0.6%	0.9%
Portugal	83.1%	0.0%	0.0%	4.7%	7.1%	0.0%	1.7%	0.0%	3.4%
Russian Fed	83.2%	0.0%	0.0%	8.8%	6.2%	0.0%	0.9%	0.0%	0.8%
Spain	63.9%	0.0%	0.0%	6.4%	6.5%	0.0%	0.3%	0.0%	22.8%
Sweden	91.3%	0.0%	0.0%	2.1%	3.2%	0.2%	0.7%	0.4%	2.1%
Switzerland	74.1%	0.0%	0.0%	2.4%	1.7%	0.0%	0.6%	0.1%	21.0%
Turkey	81.5%	0.0%	0.0%	3.8%	10.3%	0.0%	0.8%	0.0%	3.6%
UK	85.4%	0.0%	0.4%	2.4%	2.5%	0.1%	1.4%	0.1%	7.8%
Other Europe	72.5%	0.0%	0.0%	8.1%	4.1%	0.2%	0.6%	0.2%	14.4%
<b>MIDDLE EAST</b>	63.7%	0.0%	0.0%	4.0%	4.4%	0.2%	1.4%	0.0%	26.3%
UAE	38.1%	0.0%	0.0%	0.0%	6.7%	0.0%	0.7%	0.0%	54.5%
Other Middle East	71.7%	0.0%	0.0%	5.2%	3.7%	0.2%	1.7%	0.0%	17.6%
<b>NORTH AMERICA</b>	82.0%	0.0%	0.0%	3.3%	2.2%	0.0%	0.9%	0.5%	11.2%
Canada	80.4%	0.0%	0.0%	1.9%	1.5%	0.0%	0.9%	0.3%	14.9%
USA	82.4%	0.0%	0.0%	3.7%	2.4%	0.1%	0.8%	0.5%	10.1%
Total	18.3%	3.8%	30.0%	25.4%	1.6%	2.2%	10.5%	0.3%	8.0%

# APPENDIX

PURPOSE OF VISIT ( CATEGORIES)									
Q1 2020									
	Holiday	Shopping personal	Shopping business	Business traveller	MICE	Medical	VFR	Religion	Other
<b>AFRICA</b>	5.4%	17.5%	14.1%	0.9%	2.3%	0.8%	50.0%	0.9%	8.1%
Botswana	12.8%	4.8%	16.7%	0.8%	3.7%	1.0%	38.0%	6.0%	16.3%
Lesotho	1.0%	0.3%	0.6%	0.0%	1.5%	0.3%	77.3%	0.6%	18.4%
Malawi	9.5%	0.1%	42.5%	0.7%	3.5%	0.5%	33.0%	2.6%	7.6%
Mozambique	4.8%	3.3%	2.4%	0.5%	0.6%	1.7%	84.3%	0.0%	2.4%
Namibia	17.5%	0.6%	11.3%	2.5%	6.8%	5.5%	26.7%	1.4%	27.6%
Swaziland	12.5%	0.6%	3.3%	0.1%	2.5%	0.2%	75.2%	1.4%	4.2%
Zambia	5.2%	2.7%	56.3%	3.2%	5.1%	1.4%	18.3%	2.1%	5.6%
Zimbabwe	2.8%	50.6%	30.5%	0.7%	1.6%	0.1%	11.8%	0.1%	1.8%
Angola	26.0%	1.2%	0.3%	10.8%	9.2%	10.4%	21.8%	0.5%	19.8%
Democratic Republic of Congo	20.1%	0.0%	0.0%	7.7%	10.8%	7.0%	37.6%	3.7%	13.2%
Ethiopia	12.7%	0.0%	1.0%	10.1%	36.2%	2.9%	18.5%	2.6%	16.0%
Ghana	24.9%	0.0%	1.7%	6.5%	22.0%	1.4%	18.4%	1.4%	23.6%
Kenya	9.8%	0.8%	0.0%	17.6%	29.3%	0.8%	11.2%	4.3%	26.1%
Nigeria	17.5%	0.0%	0.0%	19.9%	26.6%	0.7%	15.9%	2.0%	17.4%
Tanzania	13.5%	0.0%	1.5%	11.7%	18.6%	1.4%	26.0%	3.2%	24.1%
Uganda	10.1%	0.0%	0.0%	12.2%	30.1%	1.2%	21.5%	3.4%	21.4%
Other Africa	25.5%	0.9%	0.0%	13.6%	18.5%	1.1%	18.1%	1.6%	20.6%
<b>ASIA</b>	34.6%	0.0%	0.1%	14.1%	15.4%	0.2%	27.6%	0.7%	7.2%
China including Hong Kong	36.7%	0.0%	0.0%	12.3%	10.8%	0.9%	34.3%	0.6%	4.4%
India	27.5%	0.0%	0.0%	23.9%	23.0%	0.0%	17.5%	0.8%	7.4%
Japan	50.9%	0.0%	1.0%	9.8%	10.8%	0.0%	20.3%	0.0%	7.3%
Malaysia	61.1%	0.0%	0.0%	4.2%	0.0%	0.0%	16.7%	4.2%	13.8%
Singapore	19.6%	0.0%	0.0%	11.8%	38.2%	0.0%	18.6%	3.7%	8.1%
South Korea	37.9%	0.0%	0.0%	0.7%	2.7%	0.0%	52.0%	0.7%	6.1%
Other Asia	31.0%	0.0%	0.0%	7.6%	14.5%	0.0%	36.0%	0.4%	10.5%
<b>AUSTRALASIA</b>	37.3%	0.2%	0.0%	4.2%	3.7%	0.3%	45.8%	0.5%	8.0%
Australia	39.3%	0.2%	0.0%	4.5%	3.1%	0.3%	43.2%	0.6%	8.7%
New Zealand	26.1%	0.0%	0.0%	2.4%	6.8%	0.7%	59.9%	0.0%	4.0%
Other Australasia	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	89.5%	0.0%	0.0%
<b>CENTRAL &amp; SOUTH AMERICA</b>	61.7%	0.0%	0.3%	4.7%	8.5%	0.0%	8.0%	0.2%	16.5%
Argentina	56.9%	0.0%	0.0%	6.2%	10.9%	0.0%	10.1%	1.2%	14.7%
Brazil	64.7%	0.0%	0.5%	3.0%	8.2%	0.0%	6.0%	0.0%	17.5%
Chile	59.9%	0.0%	0.0%	9.3%	4.0%	0.0%	11.7%	0.0%	15.0%
Other Central & South America	51.3%	0.0%	0.0%	10.2%	9.3%	0.0%	15.4%	0.0%	13.8%
<b>EUROPE</b>	58.7%	0.0%	0.1%	7.2%	6.2%	0.2%	20.2%	0.3%	7.1%
Austria	59.6%	0.0%	0.0%	7.4%	4.3%	1.0%	20.3%	0.0%	7.3%
Belgium	59.5%	0.0%	0.0%	9.4%	5.8%	0.0%	12.1%	0.0%	13.2%
Denmark	66.2%	0.0%	0.0%	2.4%	4.0%	0.0%	16.2%	0.0%	11.2%
Finland	57.8%	0.0%	0.0%	13.7%	13.5%	0.0%	7.2%	0.0%	7.8%
France	70.3%	0.0%	0.2%	4.8%	6.2%	0.5%	10.7%	0.0%	7.3%
Germany	64.4%	0.1%	0.0%	8.4%	5.5%	0.1%	13.5%	0.4%	7.6%
Ireland	51.2%	0.0%	0.0%	5.0%	6.3%	0.0%	32.5%	0.0%	4.9%
Italy	53.4%	0.0%	0.0%	15.9%	13.4%	0.0%	10.8%	0.0%	6.5%
Netherlands	59.2%	0.0%	0.0%	6.8%	4.3%	0.7%	20.3%	0.7%	7.9%
Norway	62.5%	0.0%	1.3%	5.2%	3.9%	0.0%	16.7%	2.6%	7.9%
Portugal	41.4%	0.0%	0.0%	7.3%	12.3%	0.0%	27.7%	0.0%	11.3%
Russian Fed	53.9%	0.0%	0.0%	16.6%	11.4%	0.0%	15.5%	0.0%	2.5%
Spain	47.7%	0.0%	0.0%	15.1%	15.1%	0.0%	10.1%	0.0%	12.1%
Sweden	61.4%	0.0%	0.0%	4.5%	7.0%	0.7%	15.8%	1.1%	9.6%
Switzerland	58.6%	0.0%	0.0%	7.0%	4.6%	0.0%	18.1%	0.6%	11.1%
Turkey	44.5%	0.0%	0.0%	7.2%	19.5%	0.0%	18.9%	0.0%	9.8%
UK	53.4%	0.0%	0.1%	4.9%	5.3%	0.2%	30.9%	0.3%	4.9%
Other Europe	50.6%	0.0%	0.0%	19.1%	8.0%	0.6%	15.7%	0.4%	5.5%
<b>MIDDLE EAST</b>	44.3%	0.0%	0.0%	8.9%	5.9%	0.0%	34.4%	0.0%	6.5%
UAE	49.9%	0.0%	0.0%	0.0%	14.8%	0.0%	28.6%	0.0%	6.8%
Other Middle East	44.2%	0.0%	0.0%	9.1%	5.6%	0.0%	34.6%	0.0%	6.5%
<b>NORTH AMERICA</b>	53.6%	0.0%	0.0%	7.3%	4.9%	0.1%	21.6%	1.7%	10.7%
Canada	56.8%	0.0%	0.0%	4.3%	3.6%	0.0%	27.5%	1.3%	6.5%
USA	52.8%	0.0%	0.0%	8.0%	5.3%	0.2%	20.2%	1.8%	11.7%
Total	16.9%	13.4%	10.9%	2.4%	3.3%	0.7%	43.5%	0.8%	8.1%



A woman in a black leather jacket, patterned leggings, and a helmet is riding a Segway through a shallow, rocky stream in a lush forest. She is smiling and looking down at the water. In the background, a man wearing a helmet and a t-shirt is also riding a Segway on the same path. The forest is dense with green trees and ferns.

# REPEAT RATE - LAND BORDER PORTS



# APPENDIX

REPEAT VISITS BY COUNTRY-LBP ONLY					
Q1 2022					
	First timers	2 - 3 times	4 - 5 times	6 - 9 times	10 times or more
<b>AFRICA</b>	<b>4.7%</b>	<b>11.2%</b>	<b>5.4%</b>	<b>4.0%</b>	<b>27.7%</b>
Botswana	0.8%	4.4%	2.9%	1.6%	33.2%
Lesotho	1.2%	2.7%	2.6%	2.4%	0.8%
Malawi	1.3%	1.3%	1.5%	5.5%	87.6%
Mozambique	9.3%	25.5%	9.4%	3.2%	0.1%
Namibia	0.0%	2.3%	1.9%	4.8%	82.1%
Eswatini	0.5%	5.3%	5.0%	9.1%	50.0%
Zambia	3.4%	3.7%	3.3%	4.9%	64.1%
Zimbabwe	6.2%	7.5%	4.5%	5.3%	75.1%
<b>TOTAL</b>	<b>4.7%</b>	<b>11.2%</b>	<b>5.4%</b>	<b>4.0%</b>	<b>27.7%</b>

REPEAT VISITS BY COUNTRY-LBP ONLY					
Q1 2021					
	First timers	2 - 3 times	4 - 5 times	6 - 9 times	10 times or more
<b>AFRICA</b>	<b>4.4%</b>	<b>7.8%</b>	<b>5.7%</b>	<b>8.8%</b>	<b>34.0%</b>
Botswana	0.8%	4.7%	3.6%	5.1%	27.8%
Lesotho	0.7%	3.3%	2.5%	1.7%	40.7%
Malawi	8.3%	12.0%	10.6%	14.1%	41.8%
Mozambique	11.4%	14.0%	7.5%	9.9%	8.2%
Namibia	2.0%	17.0%	26.9%	17.1%	32.8%
Eswatini	1.9%	4.3%	6.4%	18.4%	41.5%
Zambia	9.5%	5.5%	7.2%	10.5%	34.2%
Zimbabwe	4.1%	8.6%	5.7%	10.2%	43.0%
<b>TOTAL</b>	<b>4.4%</b>	<b>7.8%</b>	<b>5.7%</b>	<b>8.8%</b>	<b>34.0%</b>

REPEAT VISITS BY COUNTRY-LBP ONLY					
Q1 2020					
	First timers	2 - 3 times	4 - 5 times	6 - 9 times	10 times or more
<b>Africa</b>	<b>7.7%</b>	<b>8.6%</b>	<b>59.7%</b>	<b>11.8%</b>	<b>4.4%</b>
Botswana	5.0%	5.2%	56.7%	27.1%	0.8%
Lesotho	2.3%	2.6%	85.7%	5.9%	0.7%
Malawi	12.2%	6.0%	38.0%	8.7%	8.3%
Mozambique	11.4%	10.5%	39.2%	16.0%	11.4%
Namibia	3.2%	1.9%	64.6%	25.6%	2.0%
Swaziland	6.5%	12.4%	65.6%	9.0%	1.9%
Zambia	6.8%	4.9%	48.4%	16.4%	9.5%
Zimbabwe	10.2%	12.1%	53.7%	10.6%	4.1%
<b>TOTAL</b>	<b>7.7%</b>	<b>8.6%</b>	<b>59.7%</b>	<b>11.8%</b>	<b>4.4%</b>



A woman in a black leather jacket, patterned leggings, and a helmet is riding a Segway through a shallow stream in a lush forest. She is smiling and looking down at the water. In the background, a man in a grey t-shirt, shorts, and a helmet is also riding a Segway. The forest is dense with green trees and ferns. The water in the stream is brown and rocky.

# AGE CATEGORIES



# APPENDIX

AGE CARTEGORIES								
Q1 2022								
	15 -17 years	18 - 24 years	25 – 30 years	31 - 34 years	35 - 40 years	41 - 50 years	51 – 60 years	60+ years
<b>AFRICA</b>	<b>0.1%</b>	<b>2.3%</b>	<b>12.5%</b>	<b>18.5%</b>	<b>15.9%</b>	<b>18.9%</b>	<b>22.8%</b>	<b>6.4%</b>
Botswana	0.0%	0.3%	2.6%	9.5%	14.2%	27.5%	30.2%	12.8%
Lesotho	0.0%	3.8%	24.3%	26.1%	16.0%	13.9%	10.4%	3.4%
Malawi	0.1%	0.2%	1.7%	3.9%	12.3%	23.3%	49.0%	6.2%
Mozambique	0.0%	4.3%	15.8%	20.2%	15.9%	17.2%	21.5%	3.9%
Namibia	0.1%	0.6%	6.3%	14.8%	10.3%	16.3%	17.7%	17.8%
Eswatini	0.0%	0.7%	10.8%	25.1%	20.3%	18.3%	17.8%	6.0%
Zambia	0.0%	0.4%	2.7%	13.0%	17.7%	28.8%	27.8%	8.8%
Zimbabwe	0.0%	0.5%	4.1%	11.6%	15.1%	22.8%	34.3%	8.5%
Angola	2.5%	1.3%	9.3%	10.8%	16.8%	22.2%	24.1%	10.4%
DRC	1.9%	0.9%	5.7%	10.6%	10.5%	22.1%	25.7%	20.0%
Ethiopia	3.0%	0.0%	7.3%	21.3%	21.1%	21.6%	19.6%	5.9%
Ghana	5.7%	0.0%	1.3%	22.5%	29.1%	13.8%	18.4%	12.3%
Kenya	2.5%	0.0%	3.7%	14.2%	21.5%	24.8%	17.1%	14.6%
Nigeria	2.3%	0.4%	4.1%	17.2%	20.5%	21.1%	23.1%	8.3%
Tanzania	0.8%	0.0%	7.2%	17.3%	22.6%	21.1%	21.8%	3.7%
Uganda	2.1%	0.0%	9.7%	26.7%	18.5%	18.6%	16.5%	8.5%
Other Africa	2.6%	1.1%	8.4%	15.2%	19.4%	14.0%	26.6%	8.7%
<b>ASIA</b>	<b>6.1%</b>	<b>0.3%</b>	<b>5.4%</b>	<b>21.6%</b>	<b>17.2%</b>	<b>21.3%</b>	<b>17.0%</b>	<b>13.6%</b>
China including Hong Kong	5.2%	0.0%	10.2%	16.4%	19.3%	20.3%	16.4%	13.9%
India	10.2%	0.6%	6.7%	24.5%	17.0%	19.5%	16.0%	10.5%
Japan	1.8%	0.0%	6.8%	18.7%	12.1%	18.7%	22.3%	14.4%
Malaysia	7.5%	0.0%	5.8%	29.8%	25.0%	8.6%	19.2%	7.7%
Singapore	0.0%	0.0%	0.0%	25.0%	12.5%	20.8%	12.5%	29.2%
South Korea	2.5%	1.4%	10.7%	19.8%	21.0%	10.1%	24.7%	3.4%
Other Asia	2.0%	0.0%	1.8%	19.2%	16.5%	26.3%	16.8%	18.5%
<b>AUSTRALASIA</b>	<b>0.4%</b>	<b>0.3%</b>	<b>8.6%</b>	<b>11.5%</b>	<b>17.3%</b>	<b>12.2%</b>	<b>18.1%</b>	<b>22.4%</b>
Australia	0.4%	0.3%	8.9%	10.8%	17.9%	10.6%	18.6%	23.0%
New Zealand	0.0%	0.0%	5.8%	16.5%	13.0%	23.8%	14.3%	17.2%
Other Australia	0.0%	0.0%	7.7%	15.4%	7.7%	15.4%	19.2%	34.6%
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>0.7%</b>	<b>0.0%</b>	<b>9.4%</b>	<b>21.8%</b>	<b>14.5%</b>	<b>13.9%</b>	<b>18.8%</b>	<b>15.2%</b>
Argentina	0.0%	0.0%	3.5%	21.7%	18.4%	14.4%	17.3%	21.2%
Brazil	0.7%	0.0%	4.1%	19.1%	20.0%	15.2%	19.0%	15.2%
Chile	0.0%	0.0%	3.9%	14.6%	18.7%	8.8%	22.9%	22.5%
Other Central & South America	1.8%	0.0%	22.5%	28.0%	2.1%	12.1%	18.2%	11.7%
<b>EUROPE</b>	<b>1.6%</b>	<b>0.6%</b>	<b>9.9%</b>	<b>18.0%</b>	<b>15.6%</b>	<b>12.4%</b>	<b>17.4%</b>	<b>14.2%</b>
Austria	1.5%	0.0%	6.0%	24.1%	15.9%	18.7%	17.8%	11.8%
Belgium	3.8%	0.0%	12.4%	21.0%	8.6%	13.0%	16.0%	14.9%
Denmark	0.0%	0.0%	8.9%	19.7%	14.3%	9.8%	14.0%	14.8%
Finland	0.0%	0.0%	11.4%	10.9%	35.3%	8.3%	12.1%	12.1%
France	1.7%	0.9%	9.8%	19.0%	16.2%	13.0%	17.0%	13.0%
Germany	0.8%	1.0%	9.2%	19.6%	16.2%	12.8%	18.0%	13.4%
Ireland	1.5%	0.8%	6.1%	18.3%	16.7%	9.4%	21.4%	13.0%
Italy	2.4%	0.0%	9.6%	18.5%	16.4%	16.6%	14.5%	16.6%
The Netherlands	3.3%	0.4%	12.7%	20.1%	15.6%	12.0%	14.4%	13.1%
Norway	0.0%	0.0%	8.0%	17.3%	9.8%	15.3%	16.0%	20.9%
Portugal	7.9%	0.0%	6.4%	13.4%	18.8%	19.1%	13.9%	20.2%
Russian Federation	0.0%	0.0%	7.7%	25.0%	16.2%	10.7%	21.9%	13.3%
Spain	1.3%	0.6%	7.7%	14.2%	31.9%	17.2%	11.4%	8.9%
Sweden	1.0%	1.3%	10.3%	11.2%	13.3%	13.5%	18.0%	18.6%
Switzerland	1.2%	0.5%	10.6%	19.9%	18.3%	13.6%	13.3%	16.7%
Turkey	0.0%	0.0%	7.8%	17.8%	30.2%	19.9%	10.2%	8.6%
Uk	1.6%	0.6%	9.5%	16.1%	14.3%	11.2%	18.9%	14.7%
Other Europe	0.8%	0.7%	19.1%	14.1%	16.0%	11.1%	17.0%	15.6%
<b>MIDDLE EAST</b>	<b>3.4%</b>	<b>1.2%</b>	<b>12.8%</b>	<b>21.2%</b>	<b>18.3%</b>	<b>9.8%</b>	<b>13.8%</b>	<b>13.7%</b>
United Arab Emirates	0.0%	0.0%	24.7%	14.3%	19.0%	24.0%	16.1%	1.8%
Other Middle East	4.5%	1.3%	12.2%	21.6%	18.3%	9.1%	13.6%	14.3%
<b>NORTH AMERICA</b>	<b>1.8%</b>	<b>1.0%</b>	<b>8.6%</b>	<b>17.0%</b>	<b>16.1%</b>	<b>11.7%</b>	<b>17.8%</b>	<b>16.1%</b>
Canada	0.1%	0.8%	5.4%	17.2%	14.5%	12.6%	16.0%	22.0%
USA	2.3%	1.0%	9.1%	17.0%	16.3%	11.6%	18.1%	15.2%
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>TOTAL</b>	<b>0.4%</b>	<b>1.9%</b>	<b>11.8%</b>	<b>18.4%</b>	<b>15.9%</b>	<b>17.4%</b>	<b>21.5%</b>	<b>8.4%</b>

# APPENDIX

AGE CATEGORIES								
Q1 2021								
	15 -17 years	18 - 24 years	25 – 30 years	31 - 34 years	35 - 40 years	41 - 50 years	51 – 60 years	60+ years
<b>AFRICA</b>		<b>0.2%</b>	<b>4.6%</b>	<b>13.1%</b>	<b>15.8%</b>	<b>24.2%</b>	<b>31.6%</b>	<b>8.0%</b>
Botswana		0.1%	2.4%	12.3%	16.4%	28.8%	29.3%	8.3%
Lesotho		0.8%	8.5%	17.5%	17.9%	21.1%	23.4%	7.7%
Malawi		0.0%	0.6%	0.7%	14.1%	32.7%	44.6%	5.9%
Mozambique		0.2%	7.3%	15.4%	15.2%	25.0%	28.4%	6.5%
Namibia		0.1%	3.7%	14.0%	18.2%	25.8%	26.2%	7.3%
Eswatini		0.0%	2.3%	15.7%	25.3%	24.4%	26.7%	4.8%
Zambia		0.1%	0.4%	15.0%	10.4%	22.7%	45.1%	6.0%
Zimbabwe		0.0%	0.7%	5.9%	11.5%	24.1%	42.9%	12.1%
Angola		0.0%	9.8%	22.7%	17.9%	23.0%	11.9%	9.7%
DRC		0.0%	2.4%	8.7%	16.3%	9.7%	33.0%	21.1%
Ethiopia		0.0%	0.9%	12.0%	22.1%	31.8%	19.6%	4.4%
Ghana		0.0%	4.5%	25.4%	18.2%	18.9%	19.4%	7.0%
Kenya		0.4%	4.1%	15.8%	10.7%	21.1%	38.7%	5.9%
Nigeria		0.0%	3.1%	12.6%	8.8%	22.8%	37.9%	11.9%
Tanzania		0.6%	7.7%	38.3%	14.1%	21.3%	15.3%	1.8%
Uganda		0.7%	0.7%	23.6%	19.1%	19.7%	20.9%	13.1%
Other Africa		0.0%	4.0%	26.7%	18.6%	17.7%	18.4%	6.4%
<b>ASIA</b>		<b>0.3%</b>	<b>8.1%</b>	<b>32.4%</b>	<b>9.4%</b>	<b>18.3%</b>	<b>10.9%</b>	<b>6.6%</b>
China including Hong Kong		0.0%	12.9%	16.4%	12.8%	16.7%	15.6%	10.1%
India		0.1%	3.1%	36.0%	7.4%	24.7%	7.9%	5.2%
Japan		0.0%	16.8%	25.2%	13.4%	12.5%	9.8%	8.9%
Malaysia		0.0%	25.5%	8.9%	7.7%	17.3%	8.6%	7.7%
Singapore		0.0%	0.5%	3.5%	19.3%	25.9%	0.0%	14.8%
South Korea		0.0%	6.0%	53.7%	8.0%	9.6%	12.7%	2.5%
Other Asia		2.0%	6.6%	50.0%	6.6%	11.7%	13.5%	4.5%
<b>AUSTRALASIA</b>		<b>0.4%</b>	<b>12.9%</b>	<b>18.9%</b>	<b>6.2%</b>	<b>14.8%</b>	<b>12.6%</b>	<b>15.0%</b>
Australia		0.4%	12.3%	19.9%	6.0%	15.8%	12.5%	14.8%
New Zealand		0.0%	17.1%	12.2%	7.6%	8.4%	13.0%	16.2%
Other Australia		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>CENTRAL &amp; SOUTH AMERICA</b>		<b>0.2%</b>	<b>14.7%</b>	<b>28.6%</b>	<b>22.4%</b>	<b>17.3%</b>	<b>11.0%</b>	<b>2.5%</b>
Argentina		0.0%	15.0%	12.7%	21.1%	29.5%	15.1%	2.7%
Brazil		0.1%	16.9%	28.3%	18.0%	17.5%	12.5%	3.0%
Chile		0.5%	11.9%	26.8%	23.6%	15.5%	17.5%	4.0%
Other Central & South America		0.3%	11.1%	42.1%	32.7%	8.8%	1.3%	0.5%
<b>EUROPE</b>		<b>0.1%</b>	<b>9.4%</b>	<b>18.0%</b>	<b>8.9%</b>	<b>11.6%</b>	<b>14.8%</b>	<b>17.3%</b>
Austria		0.0%	20.0%	16.7%	10.2%	5.7%	27.6%	7.9%
Belgium		0.0%	11.5%	22.9%	9.0%	19.8%	7.9%	11.1%
Denmark		0.0%	7.6%	12.6%	3.3%	2.3%	8.0%	40.6%
Finland		0.0%	16.5%	8.2%	7.7%	16.2%	20.6%	17.3%
France		0.0%	9.2%	16.3%	9.6%	16.6%	15.0%	17.9%
Germany		0.3%	13.2%	23.8%	10.2%	13.0%	10.1%	14.7%
Ireland		1.5%	4.5%	18.7%	12.9%	5.4%	15.5%	16.1%
Italy		0.1%	6.0%	18.4%	9.6%	8.8%	28.5%	13.5%
The Netherlands		0.0%	10.5%	16.6%	7.2%	9.8%	11.3%	20.9%
Norway		0.0%	11.9%	19.9%	14.6%	14.4%	10.3%	9.1%
Portugal		0.0%	5.9%	30.4%	13.1%	13.2%	8.9%	10.6%
Russian Federation		0.0%	8.2%	23.1%	18.7%	20.5%	10.5%	16.3%
Spain		0.0%	6.9%	19.5%	8.3%	14.2%	36.2%	12.4%
Sweden		0.2%	6.0%	11.9%	7.9%	9.5%	12.9%	24.5%
Switzerland		0.2%	8.3%	29.7%	6.5%	16.7%	15.0%	10.1%
Turkey		0.0%	9.6%	17.5%	15.4%	23.1%	8.5%	13.0%
Uk		0.0%	6.4%	12.7%	8.0%	8.2%	15.8%	19.8%
Other Europe		0.0%	8.6%	16.4%	7.2%	10.5%	34.0%	13.5%
<b>MIDDLE EAST</b>		<b>0.0%</b>	<b>8.3%</b>	<b>18.4%</b>	<b>8.4%</b>	<b>7.0%</b>	<b>38.7%</b>	<b>7.8%</b>
United Arab Emirates		0.0%	3.8%	10.5%	14.0%	5.4%	56.7%	6.3%
Other Middle East		0.0%	9.8%	20.9%	6.5%	7.5%	32.9%	8.3%
<b>NORTH AMERICA</b>		<b>0.0%</b>	<b>8.3%</b>	<b>15.7%</b>	<b>11.4%</b>	<b>8.6%</b>	<b>13.2%</b>	<b>15.0%</b>
Canada		0.0%	5.8%	14.1%	5.8%	6.0%	17.3%	16.9%
USA		0.0%	9.0%	16.2%	13.0%	9.3%	12.0%	14.5%
Other North America		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>TOTAL</b>		<b>0.2%</b>	<b>5.5%</b>	<b>14.2%</b>	<b>14.7%</b>	<b>22.0%</b>	<b>28.6%</b>	<b>9.3%</b>



# APPENDIX

AGE CATERGORIES								
Q1 2020								
	15 -17 years	18 - 24 years	25 – 30 years	31 - 34 years	35 - 40 years	41 - 50 years	51 – 60 years	60+ years
<b>AFRICA</b>		<b>19.8%</b>	<b>24.2%</b>	<b>15.9%</b>	<b>18.9%</b>	<b>15.0%</b>	<b>4.7%</b>	<b>1.2%</b>
Botswana		11.3%	21.4%	16.7%	22.4%	19.9%	6.1%	1.8%
Lesotho		35.9%	31.9%	13.2%	11.7%	5.8%	1.1%	0.0%
Malawi		5.3%	13.0%	17.5%	29.8%	16.6%	12.9%	4.5%
Mozambique		20.6%	24.3%	19.7%	18.8%	14.3%	1.9%	0.4%
Namibia		23.4%	17.0%	14.8%	18.6%	14.6%	7.3%	3.5%
Eswatini		31.9%	31.2%	13.3%	15.0%	6.5%	1.6%	0.5%
Zambia		11.3%	11.3%	15.9%	27.1%	23.3%	9.5%	0.7%
Zimbabwe		8.1%	19.6%	16.3%	23.2%	22.4%	8.1%	2.1%
Angola		10.5%	22.3%	15.2%	20.9%	15.0%	12.0%	2.3%
DRC		5.9%	11.2%	12.9%	16.8%	28.2%	16.3%	5.9%
Ethiopia		3.6%	15.2%	14.2%	30.9%	20.2%	7.1%	3.9%
Ghana		6.1%	17.4%	17.1%	18.7%	24.9%	7.5%	3.8%
Kenya		6.4%	19.2%	14.1%	21.3%	22.7%	7.6%	3.3%
Nigeria		3.5%	12.0%	11.1%	27.4%	27.3%	13.4%	1.8%
Tanzania		13.7%	21.8%	10.1%	23.2%	23.6%	3.5%	0.6%
Uganda		1.2%	15.7%	14.0%	17.2%	26.9%	16.6%	1.6%
Other Africa		10.3%	14.8%	15.6%	19.3%	20.3%	9.5%	8.1%
<b>ASIA</b>		<b>9.8%</b>	<b>26.6%</b>	<b>12.3%</b>	<b>18.9%</b>	<b>14.5%</b>	<b>8.5%</b>	<b>6.4%</b>
China including Hong Kong		12.7%	25.1%	9.7%	19.3%	18.7%	7.3%	6.0%
India		6.3%	29.0%	14.5%	18.2%	15.2%	8.2%	5.6%
Japan		12.3%	24.2%	11.9%	12.9%	14.9%	12.1%	9.7%
Malaysia		25.4%	10.0%	10.0%	14.1%	9.0%	8.4%	17.4%
Singapore		7.5%	4.3%	19.2%	20.0%	0.0%	22.2%	26.9%
South Korea		12.9%	26.0%	13.6%	21.9%	10.4%	5.5%	3.4%
Other Asia		6.6%	33.1%	10.4%	23.7%	11.9%	7.6%	2.0%
<b>AUSTRALASIA</b>		<b>16.2%</b>	<b>15.3%</b>	<b>6.8%</b>	<b>11.6%</b>	<b>16.6%</b>	<b>16.7%</b>	<b>16.5%</b>
Australia		16.5%	15.7%	6.8%	12.2%	16.0%	16.0%	16.4%
New Zealand		14.5%	13.2%	6.6%	8.1%	19.9%	20.4%	17.4%
Other Australia		0.0%	11.8%	47.1%	41.2%	0.0%	0.0%	0.0%
<b>CENTRAL &amp; SOUTH AMERICA</b>		<b>21.2%</b>	<b>25.7%</b>	<b>15.3%</b>	<b>16.6%</b>	<b>11.8%</b>	<b>4.3%</b>	<b>3.2%</b>
Argentina		24.6%	15.9%	15.4%	23.4%	12.1%	5.8%	2.8%
Brazil		19.9%	26.8%	14.9%	16.6%	12.3%	4.1%	3.8%
Chile		16.3%	22.0%	22.3%	12.1%	18.9%	5.5%	2.0%
Other Central & South America		26.5%	35.5%	13.9%	7.8%	4.4%	2.4%	1.0%
<b>EUROPE</b>		<b>12.8%</b>	<b>18.5%</b>	<b>8.9%</b>	<b>10.1%</b>	<b>15.2%</b>	<b>16.6%</b>	<b>16.4%</b>
Austria		20.1%	18.9%	11.9%	10.7%	12.7%	11.7%	11.7%
Belgium		18.6%	19.1%	9.6%	12.7%	9.3%	14.4%	12.8%
Denmark		15.9%	16.8%	4.8%	4.8%	8.8%	24.0%	24.0%
Finland		17.6%	7.2%	8.9%	14.0%	24.0%	16.1%	12.4%
France		14.1%	19.8%	10.0%	8.7%	16.4%	15.4%	13.5%
Germany		17.9%	23.2%	8.8%	9.7%	12.5%	15.2%	11.5%
Ireland		10.1%	16.7%	12.2%	5.9%	14.4%	19.9%	19.4%
Italy		8.7%	22.2%	11.2%	10.8%	19.1%	11.0%	14.4%
The Netherlands		14.5%	18.0%	7.8%	11.4%	12.5%	15.4%	17.8%
Norway		13.5%	22.7%	10.1%	10.9%	11.7%	11.1%	20.0%
Portugal		8.4%	27.6%	14.6%	17.8%	13.7%	7.0%	7.1%
Russian Federation		11.5%	17.7%	19.3%	15.9%	15.3%	16.3%	3.9%
Spain		9.7%	21.4%	8.4%	20.1%	20.7%	16.6%	2.1%
Sweden		7.7%	14.8%	9.0%	8.5%	17.2%	22.3%	19.3%
Switzerland		14.4%	21.6%	8.7%	9.7%	19.4%	11.9%	12.3%
Turkey		13.8%	18.2%	11.1%	23.6%	17.0%	11.6%	4.7%
Uk		8.0%	14.0%	7.9%	8.9%	16.9%	19.6%	23.5%
Other Europe		12.6%	22.6%	9.4%	15.0%	20.8%	12.8%	6.6%
<b>MIDDLE EAST</b>		<b>9.9%</b>	<b>17.5%</b>	<b>11.7%</b>	<b>10.0%</b>	<b>23.3%</b>	<b>10.2%</b>	<b>11.4%</b>
United Arab Emirates		5.8%	12.3%	20.2%	23.3%	19.6%	11.6%	3.1%
Other Middle East		10.0%	17.7%	11.4%	9.6%	23.4%	10.1%	11.7%
<b>NORTH AMERICA</b>		<b>13.6%</b>	<b>15.7%</b>	<b>9.0%</b>	<b>9.3%</b>	<b>14.3%</b>	<b>15.5%</b>	<b>20.9%</b>
Canada		9.3%	19.0%	7.9%	8.2%	12.5%	17.6%	25.0%
USA		14.6%	14.9%	9.2%	9.5%	14.7%	15.0%	19.9%
Other North America		0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>TOTAL</b>		<b>18.3%</b>	<b>23.0%</b>	<b>14.4%</b>	<b>17.1%</b>	<b>15.0%</b>	<b>7.1%</b>	<b>4.5%</b>



A woman in a black leather jacket, patterned leggings, and a black helmet is riding a Segway through a shallow stream in a lush green forest. She is smiling and looking down at the water. In the background, a man in a grey t-shirt, khaki shorts, and a helmet is also riding a Segway. The stream is filled with rocks and splashing water. The text "INTERNATIONAL ARRIVALS — PROVINCIAL DISTRIBUTION" is overlaid in white capital letters on a dark horizontal band across the middle of the image.

# INTERNATIONAL ARRIVALS — PROVINCIAL DISTRIBUTION



# APPENDIX

INTERNATIONAL ARRIVAL - PROVINCIAL DISTRIBUTION									
Q1 2022									
	Gauteng	Western Cape	Eastern Cape	KwaZulu Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
AFRICA	310 791	39 705	6 450	85 500	215 119	24 704	39 649	21 693	108 932
Botswana	19 658	1 128	454	1 227	564	6 098	15 120	103	2 207
Lesotho	49 969	7 032	1 312	5 422	3 461	527	13 425	2 413	102 513
Malawi	20 226	683	125	868	0	403	379	0	0
Mozambique	39 972	1 651	98	1 807	179 879	2 111	1 191	0	598
Namibia	5 359	16 220	802	763	208	210	1 366	18 891	499
Eswatini	23 735	417	835	23 509	20 532	1 130	1 011	0	1 199
Zambia	12 396	1 131	180	13 655	1 070	318	172	33	353
Zimbabwe	117 129	4 406	1 667	35 813	8 725	13 452	6 297	91	1 134
Angola	3 299	1 668	96	146	57	96	57	0	23
DRC	2 901	515	35	126	0	30	90	0	0
Ethiopia	679	171	25	37	0	12	25	12	53
Ghana	1 682	778	205	162	36	0	92	30	98
Kenya	3 036	516	69	383	173	31	0	23	23
Nigeria	3 145	987	134	395	63	15	103	0	102
Tanzania	2 561	399	73	146	81	73	114	0	25
Uganda	1 413	105	117	29	58	0	53	0	58
Other Africa	3 631	1 898	224	1 012	211	197	153	96	49
ASIA	7 859	4 430	1 177	2 198	992	239	602	126	75
China including Hong Kong	510	643	114	81	27	37	27	9	0
India	3 297	1 731	487	1 340	226	125	113	72	37
Japan	258	175	44	65	36	24	25	19	0
Malaysia	121	148	40	29	35	11	19	0	0
Singapore	56	55	23	11	0	9	3	0	0
South Korea	323	220	38	126	22	16	19	0	0
Other Asia	3 295	1 459	431	546	646	18	397	26	39
AUSTRALASIA	3 616	2 754	494	1 180	497	371	235	49	245
Australia	3 278	2 394	437	1 106	413	317	199	36	215
New Zealand	332	356	54	72	83	54	35	13	29
Other Australia	6	4	3	2	1	0	1	0	0
CENTRAL & SOUTH AMERICA	1 632	1 586	283	642	544	189	121	47	58
Argentina	206	136	42	38	38	49	0	0	9
Brazil	852	849	157	319	181	89	89	47	24
Chile	68	74	25	33	39	6	6	0	6
Other Central & South America	507	528	59	252	285	45	26	0	18
EUROPE	65 964	106 285	20 323	23 048	17 849	10 463	6 077	2 785	2 848
Austria	1 395	1 733	426	387	204	111	111	38	54
Belgium	2 015	3 341	867	745	969	413	141	147	83
Denmark	949	1 558	238	200	493	699	201	194	0
Finland	190	575	62	144	115	0	29	0	17
France	4 913	7 389	949	1 412	2 071	827	405	88	168
Germany	13 042	25 967	5 845	4 158	5 381	2 517	1 642	669	485
Ireland	1 532	2 148	420	696	210	197	147	0	210
Italy	1 222	2 090	507	397	254	213	115	62	36
The Netherlands	6 036	10 612	2 245	1 199	2 294	1 078	487	442	394
Norway	422	1 004	173	331	133	41	110	62	12
Portugal	786	1 121	141	313	108	37	13	35	22
Russian Federation	1 459	1 348	162	421	217	166	207	39	80
Spain	1 129	1 447	176	306	317	97	59	132	0
Sweden	1 068	2 219	342	538	253	189	133	86	19
Switzerland	1 400	5 328	1 103	1 078	671	461	300	118	83
Turkey	588	957	19	135	37	68	0	55	36
Uk	25 406	35 019	5 764	9 985	3 744	2 792	1 723	379	1 072
Other Europe	2 412	2 432	886	605	378	557	253	239	78
MIDDLE EAST	2 444	1 447	287	214	423	90	120	87	34
United Arab Emirates	86	77	22	10	4	15	3	0	18
Other Middle East	2 358	1 370	265	204	420	75	117	87	16
NORTH AMERICA	16 702	18 281	3 574	4 129	5 292	2 950	1 732	709	1 085
Canada	1 966	3 009	605	756	387	301	188	57	83
USA	14 735	15 272	2 969	3 373	4 905	2 649	1 544	652	1 002
UNSPECIFIED	0	0	0	0	0	0	0	0	0
TOTAL	409 008	174 488	32 588	116 911	240 716	39 006	48 536	25 496	113 278

# APPENDIX

INTERNATIONAL ARRIVAL - PROVINCIAL DISTRIBUTION									
Q1 2021									
	Gauteng	Western Cape	Eastern Cape	KwaZulu Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
<b>AFRICA</b>	<b>135 951</b>	<b>14 431</b>	<b>1 558</b>	<b>41 741</b>	<b>71 218</b>	<b>16 973</b>	<b>17 783</b>	<b>15 629</b>	<b>38 657</b>
Botswana	6 492	282	163	381	266	2 775	5 647	3	608
Lesotho	24 064	745	558	7 240	854	971	3 237	1 516	35 744
Malawi	7 235	561	9	217	171	171	88	0	4
Mozambique	29 827	571	8	676	59 265	1 928	1 044	0	192
Namibia	2 354	9 647	27	151	45	99	867	13 941	254
Eswatini	11 310	766	444	10 070	5 178	1 051	1 070	165	810
Zambia	6 533	112	35	6 439	731	1 013	165	0	26
Zimbabwe	43 193	275	97	16 192	4 522	8 864	5 488	0	984
Angola	631	385	26	21	15	10	3	0	0
DRC	210	52	11	42	0	0	14	0	0
Ethiopia	218	48	11	27	14	3	10	0	0
Ghana	418	67	45	52	3	14	47	0	0
Kenya	629	111	25	71	10	26	3	0	0
Nigeria	839	246	36	56	16	14	0	0	2
Tanzania	579	81	9	7	6	10	13	0	0
Uganda	196	39	5	37	14	0	16	0	0
Other Africa	1 222	444	51	62	110	24	70	3	32
<b>ASIA</b>	<b>3 161</b>	<b>2 755</b>	<b>362</b>	<b>627</b>	<b>647</b>	<b>88</b>	<b>279</b>	<b>190</b>	<b>29</b>
China including Hong Kong	570	755	122	101	243	4	75	3	19
India	1 530	638	74	304	157	29	125	183	3
Japan	260	398	50	60	142	45	24	3	0
Malaysia	51	108	10	21	21	0	11	0	0
Singapore	50	37	5	6	10	3	0	0	3
South Korea	268	388	23	34	36	0	0	0	3
Other Asia	433	430	78	100	37	5	43	0	0
<b>AUSTRALASIA</b>	<b>1 256</b>	<b>1 607</b>	<b>445</b>	<b>528</b>	<b>670</b>	<b>401</b>	<b>217</b>	<b>42</b>	<b>88</b>
Australia	1 077	1 416	386	447	572	395	178	35	86
New Zealand	179	191	59	81	98	6	39	7	2
Other Australia	0	0	0	0	0	0	0	0	0
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>1 690</b>	<b>2 365</b>	<b>415</b>	<b>175</b>	<b>1 054</b>	<b>194</b>	<b>203</b>	<b>173</b>	<b>2</b>
Argentina	386	390	66	48	254	52	21	0	0
Brazil	876	1 274	296	58	531	104	139	0	2
Chile	191	250	21	45	139	23	31	0	0
Other Central & South America	237	451	32	24	130	14	10	173	0
<b>EUROPE</b>	<b>12 927</b>	<b>29 993</b>	<b>8 883</b>	<b>6 425</b>	<b>10 023</b>	<b>2 439</b>	<b>1 409</b>	<b>784</b>	<b>820</b>
Austria	162	675	204	76	108	32	21	14	32
Belgium	648	886	178	225	619	125	26	10	21
Denmark	213	381	94	98	169	205	74	174	11
Finland	70	213	52	15	38	10	2	0	2
France	1 900	3 339	530	1 117	2 137	336	220	24	34
Germany	2 481	7 039	2 888	1 423	2 041	464	247	195	187
Ireland	206	539	134	102	140	23	21	0	1
Italy	526	921	218	130	406	51	20	41	11
The Netherlands	919	2 632	647	825	1 178	376	147	103	87
Norway	187	435	123	131	146	31	35	0	11
Portugal	124	421	118	67	86	13	33	0	10
Russian Federation	189	334	70	36	56	17	11	10	4
Spain	412	455	95	57	157	24	29	6	10
Sweden	317	763	167	156	328	78	9	33	23
Switzerland	441	1 490	400	285	375	68	12	36	218
Turkey	110	155	48	10	21	0	31	11	0
Uk	3 390	8 549	2 781	1 492	1 752	526	408	123	125
Other Europe	632	766	138	181	267	59	64	3	34
<b>MIDDLE EAST</b>	<b>681</b>	<b>717</b>	<b>95</b>	<b>135</b>	<b>115</b>	<b>31</b>	<b>106</b>	<b>4</b>	<b>1</b>
United Arab Emirates	255	86	0	11	6	0	0	0	0
Other Middle East	426	631	95	123	108	31	106	3	1
<b>NORTH AMERICA</b>	<b>5 084</b>	<b>7 227</b>	<b>1 166</b>	<b>1 420</b>	<b>2 773</b>	<b>789</b>	<b>410</b>	<b>80</b>	<b>162</b>
Canada	1 250	1 547	327	396	750	132	58	11	55
USA	3 833	5 681	839	1 025	2 023	656	352	69	107
<b>UNSPECIFIED</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TOTAL</b>	<b>160 750</b>	<b>59 096</b>	<b>12 924</b>	<b>51 051</b>	<b>86 499</b>	<b>20 914</b>	<b>20 407</b>	<b>16 902</b>	<b>39 759</b>



# APPENDIX

INTERNATIONAL ARRIVAL - PROVINCIAL DISTRIBUTION									
Q1 2020									
	Gauteng	Western Cape	Eastern Cape	KwaZulu Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
<b>AFRICA</b>	<b>509 270</b>	<b>55 928</b>	<b>8 501</b>	<b>99 960</b>	<b>305 297</b>	<b>555 084</b>	<b>99 392</b>	<b>26 889</b>	<b>282 338</b>
Botswana	41 366	1 988	581	10 923	1 347	25 135	51 585	26	4 335
Lesotho	105 706	10 830	1 897	11 187	5 072	3 860	25 293	4 544	274 590
Malawi	35 883	6 205	137	2 377	53	29	1 401	0	55
Mozambique	128 804	1 907	128	675	210 066	5 711	10 740	31	0
Namibia	9 426	16 965	846	762	560	184	2 608	22 119	1 119
Eswatini	47 476	467	36	64 632	80 374	2 313	0	0	1 612
Zambia	28 351	881	875	3 027	224	1 365	105	0	86
Zimbabwe	70 400	5 059	1 774	2 733	6 273	515 854	6 339	0	236
Angola	9 160	3 181	360	476	164	49	99	0	0
DRC	4 597	582	168	408	0	49	168	0	0
Ethiopia	1 033	195	34	141	34	25	21	0	0
Ghana	3 087	603	227	382	137	56	191	41	28
Kenya	3 986	740	264	535	22	121	55	22	0
Nigeria	5 380	2 031	274	482	165	66	30	0	79
Tanzania	3 686	465	177	129	111	25	74	0	0
Uganda	2 176	258	169	433	50	44	162	0	0
Other Africa	8 752	3 572	552	659	645	199	520	106	198
<b>ASIA</b>	<b>25 830</b>	<b>19 987</b>	<b>4 293</b>	<b>6 238</b>	<b>5 118</b>	<b>1 270</b>	<b>2 348</b>	<b>524</b>	<b>704</b>
China including Hong Kong	6 302	5 836	1 252	1 267	1 389	275	713	299	238
India	10 016	5 665	789	2 264	1 420	397	960	114	113
Japan	2 760	2 507	640	619	874	260	159	49	55
Malaysia	576	808	75	149	116	54	95	0	0
Singapore	796	562	148	146	50	57	0	0	50
South Korea	1 643	2 214	589	516	466	97	97	48	169
Other Asia	3 736	2 395	802	1 277	804	130	326	13	79
<b>AUSTRALASIA</b>	<b>11 959</b>	<b>9 666</b>	<b>2 960</b>	<b>3 854</b>	<b>3 452</b>	<b>1 773</b>	<b>1 642</b>	<b>415</b>	<b>860</b>
Australia	10 210	8 335	2 560	3 250	2 878	1 578	1 322	250	664
New Zealand	1 741	1 323	400	597	565	186	320	165	196
Other Australia	8	8	0	7	8	9	0	0	0
<b>CENTRAL &amp; SOUTH AMERICA</b>	<b>15 715</b>	<b>19 369</b>	<b>3 559</b>	<b>1 690</b>	<b>7 638</b>	<b>1 475</b>	<b>1 845</b>	<b>88</b>	<b>133</b>
Argentina	3 102	3 215	538	501	1 518	415	229	0	48
Brazil	10 013	13 104	2 748	855	5 056	864	1 475	0	62
Chile	722	1 071	90	161	398	74	112	41	0
Other Central & South America	1 878	1 979	183	174	666	122	30	47	23
<b>EUROPE</b>	<b>131 030</b>	<b>235 373</b>	<b>72 529</b>	<b>53 350</b>	<b>66 199</b>	<b>20 907</b>	<b>15 009</b>	<b>6 771</b>	<b>7 134</b>
Austria	2 804	5 465	1 847	1 147	1 058	534	179	351	444
Belgium	4 182	6 106	1 407	1 589	2 864	819	281	64	114
Denmark	2 255	3 407	644	902	1 159	1 543	708	191	192
Finland	1 000	1 922	383	207	390	50	75	0	50
France	12 344	22 076	3 881	6 509	10 595	2 343	1 603	167	238
Germany	26 372	61 246	22 963	13 519	16 988	4 432	3 238	2 469	2 338
Ireland	2 930	4 557	1 560	1 258	1 203	242	174	0	235
Italy	3 360	5 590	1 345	826	2 316	504	407	313	142
The Netherlands	9 116	17 280	4 577	4 045	6 763	2 317	1 026	736	475
Norway	1 673	2 882	759	1 046	848	157	317	0	127
Portugal	1 650	2 265	545	386	448	183	217	0	33
Russian Federation	2 243	3 001	770	392	489	303	131	104	199
Spain	2 303	2 957	607	376	756	207	255	92	44
Sweden	5 138	7 580	1 727	1 814	3 245	923	342	352	259
Switzerland	4 431	8 926	2 703	1 811	2 263	736	68	273	275
Turkey	2 028	1 690	663	376	131	0	376	154	0
Uk	41 687	71 816	24 445	15 745	12 473	5 007	4 699	1 239	1 758
Other Europe	5 514	6 607	1 702	1 401	2 210	605	913	266	211
<b>MIDDLE EAST</b>	<b>4 144</b>	<b>4 568</b>	<b>595</b>	<b>1 446</b>	<b>762</b>	<b>364</b>	<b>1 074</b>	<b>170</b>	<b>217</b>
United Arab Emirates	180	96	0	17	8	10	10	4	4
Other Middle East	3 964	4 472	595	1 428	754	354	1 064	166	213
<b>NORTH AMERICA</b>	<b>37 614</b>	<b>45 037</b>	<b>8 069</b>	<b>10 170</b>	<b>15 160</b>	<b>5 446</b>	<b>3 687</b>	<b>628</b>	<b>1 674</b>
Canada	7 069	9 479	1 960	2 802	3 710	812	571	135	486
USA	30 546	35 558	6 109	7 368	11 449	4 633	3 115	493	1 188
<b>UNSPECIFIED</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>
<b>TOTAL</b>	<b>735 563</b>	<b>389 928</b>	<b>100 506</b>	<b>176 708</b>	<b>403 625</b>	<b>586 319</b>	<b>124 997</b>	<b>35 484</b>	<b>293 060</b>

# NORMALISING SPEND DATA

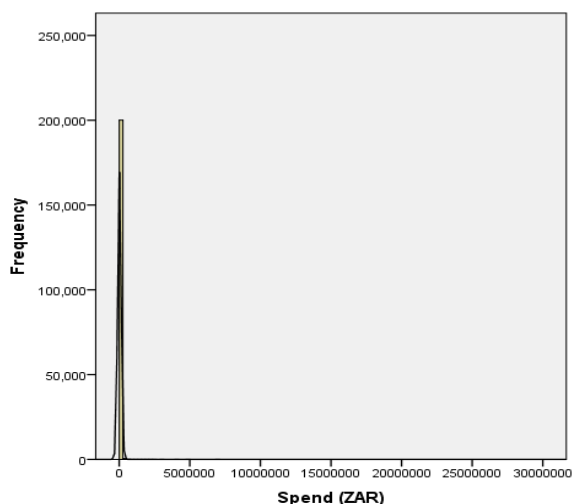
SA Tourism reviewed its performance over the past four years. In those four years, we have grown the survey of air arrivals from a summer and winter survey to a monthly survey at two airports and started surveying land arrivals at the 10 busiest land border posts every month. The review provided an opportunity to measure what our marketing has achieved in the past four years and review the departure survey methodology using trend data.

Of particular concern to us was the spend data, which we have been cleaning every quarter. A large number of responses fall below the mean, with several large outliers. Analysing the data confirmed that the responses were valid as the low spenders were mainly from SADC and stayed for only one or two nights. The higher spenders from SADC bought items such as houses and motor cars. As expected, people who stay longer spend more.

Furthermore, spend is seasonal and varies from month to month. Therefore, outliers also vary from one month to the next. The rules for normalising data must be consistent and take these seasonal variations into account. Analysis of spend data showed that the distribution of spend closely resembles an exponential curve rather than a normal curve, which we have been using in our cleaning rules.

**SA spend distribution is much closer to an exponential curve than a normal curve; the majority of responses are below the mean with a few very high outliers**

**SA Spend 2017-2021**  
(All Responses, unweighted)



- Mean = 18,261.41
- Std. Dev. = 124,022.201
- N = 200,817

Source: 2017-2021 SAT Departure Survey.

# NORMALISING SPEND DATA CONTINUED

Transform the log values back to spend values using the following formula:

Exclude all variables that fall outside the cut-off values.  
The normalization process leads to the following results for 2021:

$$\text{Log\_Low\_cut\_off} = \text{Mean} - 3 \times \text{Stdev}$$
$$\text{Log\_Upper\_cut\_off} = \text{Mean} + 3 \times \text{Stdev}$$

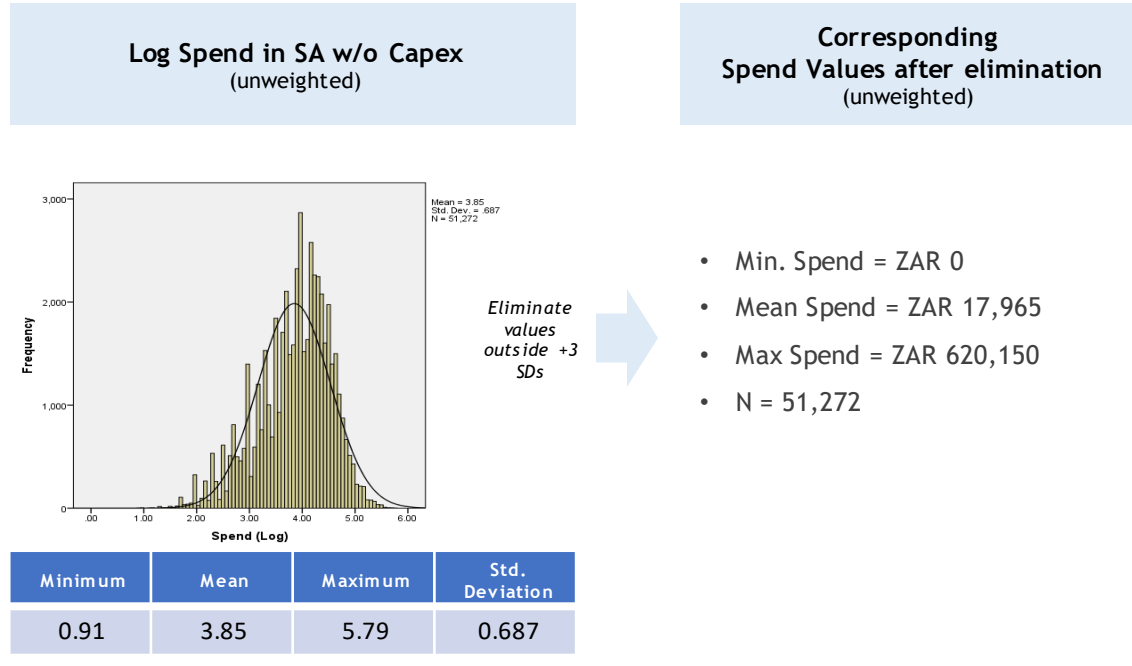
$$\text{Lower-cut-off Value} = 10^{(\text{Log\_Low\_cut\_off})}$$
$$\text{Upper-cut-off Value} = 10^{(\text{Log\_Upper\_cut\_off})}$$

Based on this information, SA Tourism has revised the methodology for normalizing spend data. This chapter provides the details of how the data has been normalized. SA Tourism now normalizes the spend data by eliminating 3-standard deviations from the logarithmic mean.

$y = \log_{10}(x)$   
Compute log of spend variable using the formula above  
Calculate the mean of the result obtained in (1) above.  
Determine the cut-off criteria using the following formula:

## SA Spend Logarithmic Values

Plotting the log of the SA spend produces a normal distribution allowing us to eliminate values outside 3 SDs from the mean



Source: 2021 SAT Departure Survey.



*Inspiring new ways*

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