



Tourism Market Insights Zimbabwe: 2021

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Contents

1. Overview of Zimbabwe
2. Overview of the Zimbabwean Travel Market
3. The Zimbabwean traveller to South Africa
 - 3.1 Visitor Arrivals to South Africa
 - 3.2 Purpose of visit to South Africa
4. The Zimbabwean traveller to the Western Cape
5. Key Findings
6. List of sources

1. Overview of Zimbabwe

About Zimbabwe

Where is Zimbabwe	Zimbabwe is located in the Southern Africa, between South Africa and Zambia.
Population (millions)	15,1 million (<i>Euromonitor International, 2021</i>)
Time Difference	South Africa is 1 hour behind Saudi Arabia.
Language	Shona & Ndebele
Time Difference	There is no time difference between Zimbabwe and South Africa

General Overview

Zimbabwe's economy depends heavily on its mining and agriculture sectors. Following a contraction from 1998 to 2008, the economy recorded real growth of more than 10% per year in the period 2010-13, before falling below 3% in the period 2014-17, due to poor harvests, low diamond revenues, and decreased investment.

Lower mineral prices, infrastructure and regulatory deficiencies, a poor investment climate, a large public and external debt burden, and extremely high government wage expenses impede the country's economic performance.

However, The economy recovered in 2021 mainly boosted by higher agricultural production, improved capacity utilization in industry, and stabilization of prices and exchange rates. GDP is expected to rebound to 5.1% after a two-year contraction. The strong rebound is anchored by a better 2020/21 rain season, boosting agriculture, electricity, and water. Stabilizing prices, increasing investment in public infrastructure bolstered domestic demand.

Growth is expected to strengthen further in 2022 as the negative impacts of COVID-19 subside, rain levels remain good, and implementation of policies outlined in the National Development Strategy accelerates. Good vaccination progress is likely to boost tourism, trade, transport, and other sectors that were negatively affected by pandemic disruptions.

2. The Zimbabwean traveller to South Africa

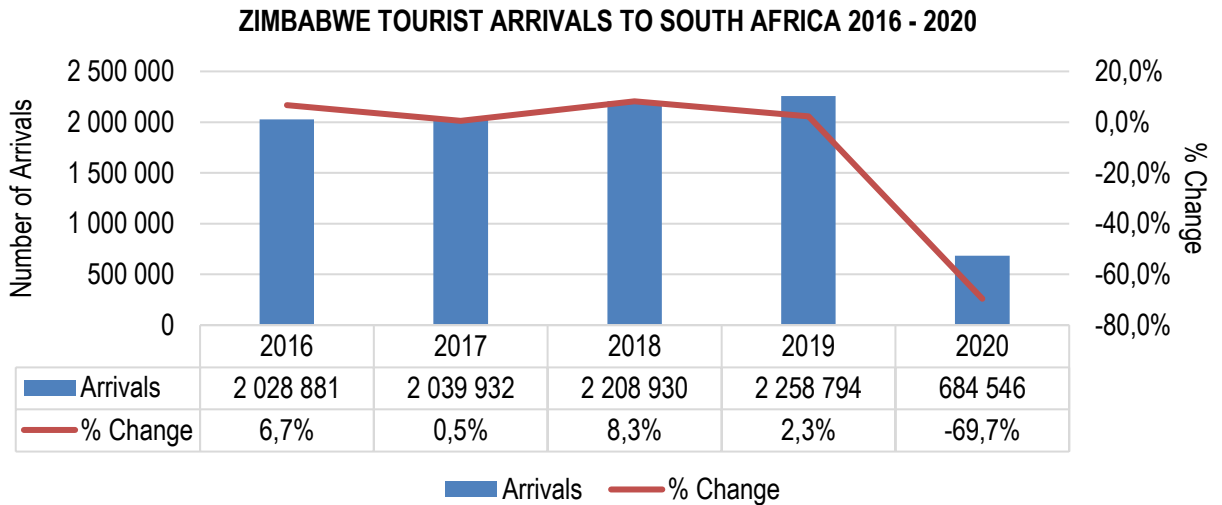
Zimbabwean Travel Market

Number of Arrivals	2016: 2 028 881 2017: 2 039 932 2018: 2 208 930 2019: 2 258 794 2020: 684 546
Purpose of visit to South Africa (2020)	Personal Shopping: (44,2%) Business Shopping (32,5%) VFR (11,3%)
Average length of stay in South Africa (Number of nights, 2020)	2018: 4,9 2019: 4,8 2020: 4
Age profile (2020)	18 – 24 yrs (7,9%) 25 – 34 yrs (36,1%) 35 – 44 yrs (33,4%) 45 – 54 yrs (16,8%)
Repeater Rate of Zimbabwe Travellers (2020)	1. 10+ times: 43,2% 2. 6-9 times: 23,6%
Accommodation Usage (2019)	1. Friends & Family 2. Self Catering 3. Hotel
Total Foreign Direct Spend in South Africa (R in billions)	2018: R 12,3 2019: R 11,6 2020: R 3,8
Average Spend in South Africa	2018: R 5 600 2019: R 5 100 2020: R 5 500



3. The Zimbabwean traveller to South Africa

3.1. Visitor Arrivals to South Africa



3.2. Purpose of visit to South Africa

Travellers from Zimbabwe mainly visit the country for shopping purposes (business or personal) or to visit family and friends. Close to 5% visit for business and 2,9% indulge themselves in holiday activities.

In 2020, Zimbabwean travellers stayed in South Africa for an average of 4 nights.

Top reasons for travel to SA

Personal Shopping (44,2%)

Business Shopping (32,5%)

VFR (11,3%)

Business (4,5%)

Holiday (2,9%)

Average length of Stay in 2020

4 nights

Top activities undertaken

Casino Visits

Trading

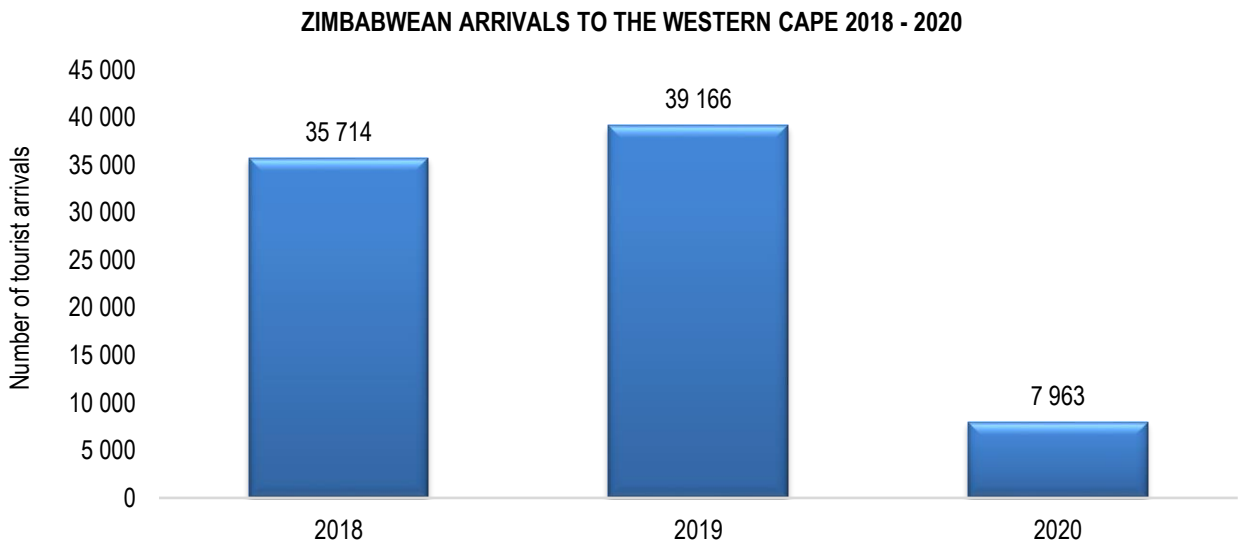
Shopping

Sport Spectator

Casino's, Trading and shopping were among the top activities undertaken by Zimbabwean tourists while in South Africa.

If they are not staying with friends and relatives most of these travellers relax themselves in Self catering establishments or hotels.

4. The Zimbabwean traveller to the Western Cape

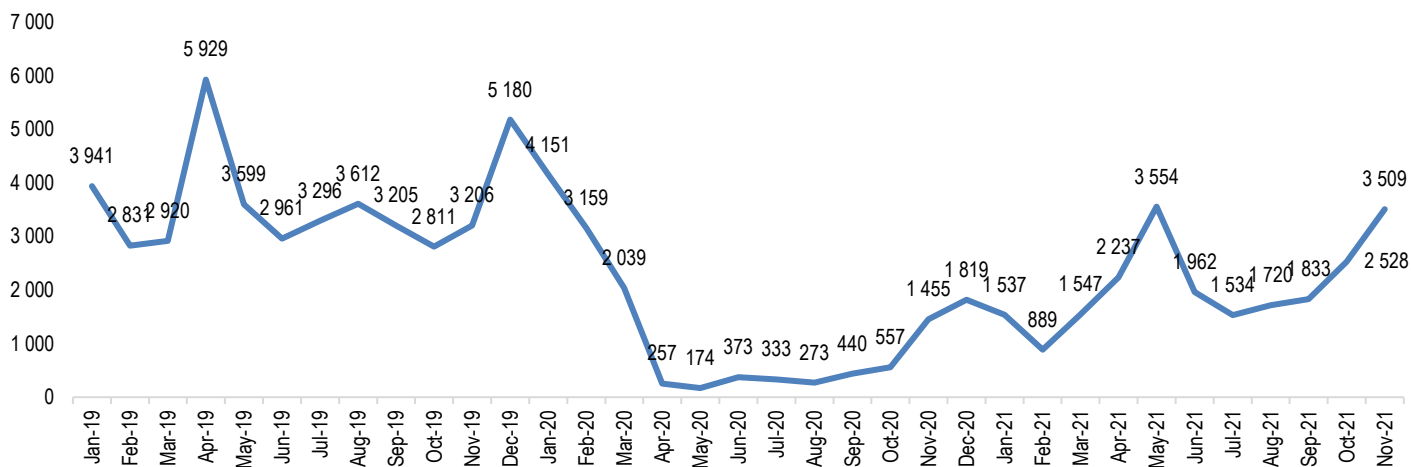


4.1. Passenger Traffic through Cape Town International Airport

According to the latest OAG Traffic Analyzer data, Zimbabwean passenger movement through Cape Town International Airport has shown a steady increase as compared to the lockdown period that was faced in 2020 as a result of the Covid-19 pandemic. Passenger movement was almost non-existent between April and September 2020.

Passenger movement has been rising steadily with the re-opening of air travel in October 2020 and has been climbing slowly with a peak in May 2021 (3554).

ZIMBABWEAN PASSENGER MOVEMENT THROUGH CAPE TOWN INTERNATIONAL AIRPORT, JAN 2019 - NOV 2021



Source: OAG Traffic Analyser, 2021

5. Key Findings

- COVID-19 has been devastating for Travel & Tourism, causing considerable losses for the individuals employed by the sector and the communities and livelihoods that depend on that income. In 2020, the sector experienced a US\$ 4.5 trillion drop in GDP and losses of 62 million jobs around the globe.
- Yet, as governments and businesses implemented measures to proactively address COVID-19, social lives slowly began to resume. In turn, traveler demand and positive consumer sentiment around travel continues to grow, giving hope to all those who depend on the Travel & Tourism sector for survival.
- Travellers from the Zimbabwe to South Africa are predominantly visiting for shopping purposes or to visit family and friends. These travellers stayed in the country for an average length of 4 nights in 2020.
- They are more likely to stay with family and friends or in self-catering accommodation establishments.
- Passengers from Zimbabwe through Cape Town International Airport doubled in January 2020 when compared to 2019. However, due to travel restrictions brought on by the COVID-19 pandemic, passenger arrivals decreased dramatically throughout the rest of 2020. Passenger movement increased highly in 2021, with figures tripling in number as compared to the previous year.
- While travelers are still concerned about COVID-19 transmission, their growing confidence is enabled by the public and private sectors whose open virus management measures are present throughout the travel journey. Indeed, consumers are more careful than ever; as they increasingly pay attention to how travel establishments are protecting their health and that of the staff that help make their travel possible.

6. List of sources

1. South African Tourism
2. Euromonitor International
3. OAG Airline Passenger Traffic Analyser
4. CIA Factbook
5. The World Bank.Org
6. World Travel and Tourism Council

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