



SOUTH AFRICAN TOURISM

Tourism

Insights Report

September 2022

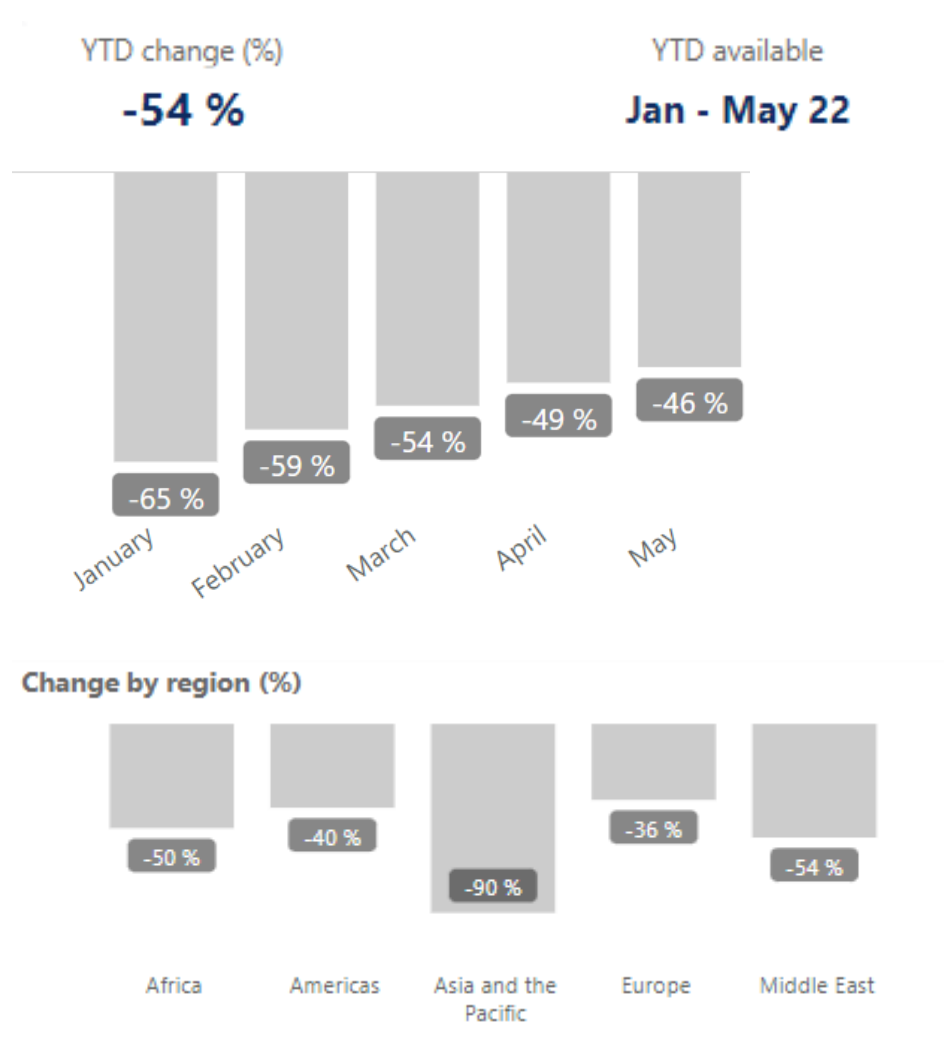


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Global Arrivals Performance – Jan to May 2022

- Globally arrivals are 54% below 2019 levels.
- There has been a steady improvement globally from January to May 2022
- Europe is the best performing region at minus 36% below 2019 levels
- Americas performed at minus 40% below 2019 levels which makes it the second-best performing region
- Asia and Pacific is still the worst performing region due to border closers and strict travel policies.
- The African region performed well at 50% below 2019 levels
- In May South Africa was performing slightly lower than the global average but has improved by 2% in June 2022



Source: UNWTO

th African Tourism

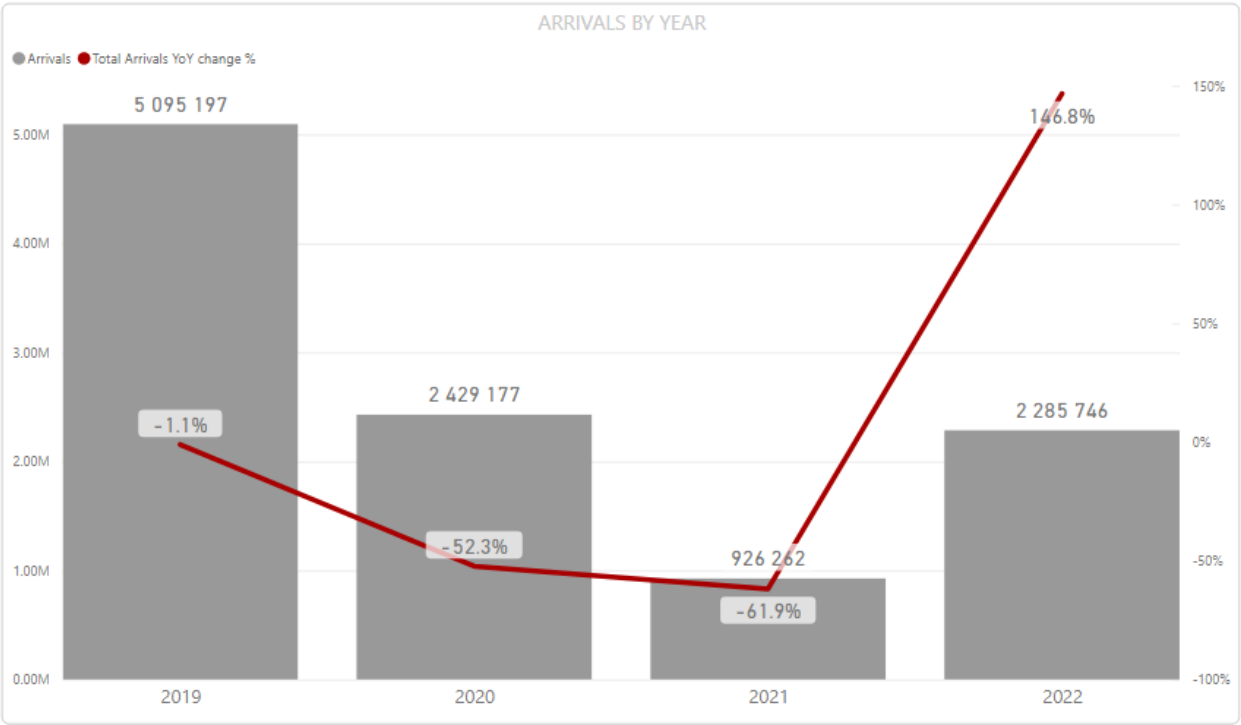
Jan-May, SA is -57% below 2019 levels and has improved in June to -55%

Total Arrivals – January to June

- Total arrivals for the month of January – June 2022 was 2,285,746
- This was a 147% increase from January – June of the previous year
- January – June 2022 represented 45% of 2019 levels and therefore 55% below 2019 levels.

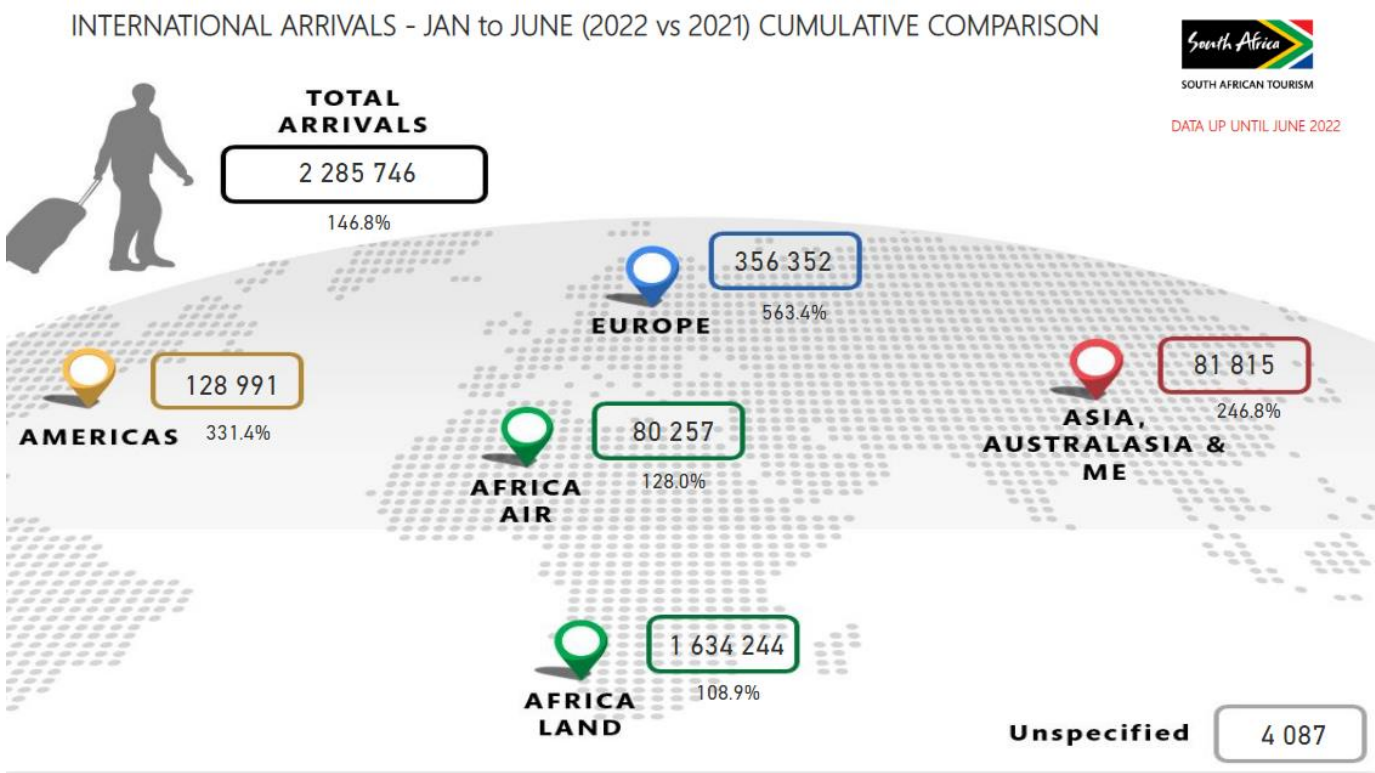
INTERNATIONAL ARRIVALS

DATA UP UNTIL JUNE 2022



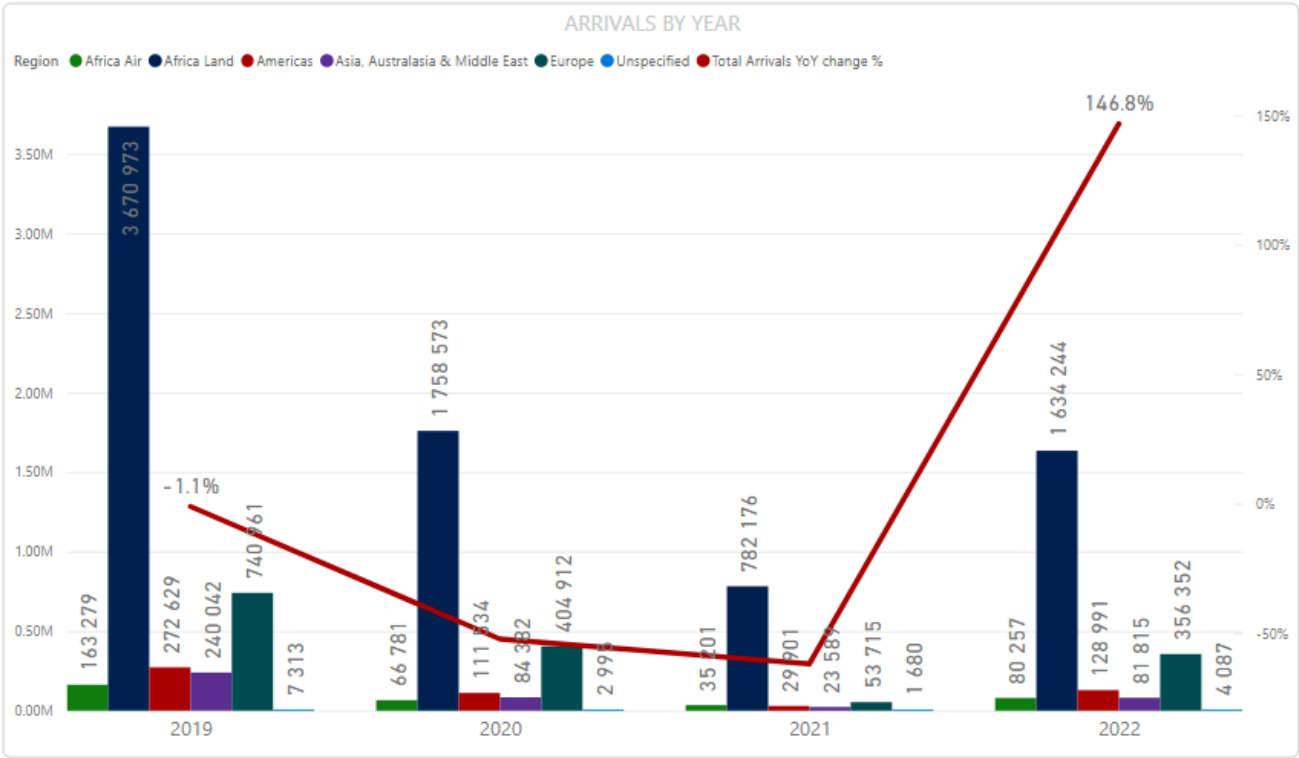
Total Arrivals – January to June

- The biggest market in terms of real numbers was the African Land markets; these markets had a 109% increase in arrivals when compared with the same period in 2021.
- The Africa Land markets brought in 1,634,244 arrivals.
- Arrivals from the Americas increased by 331% and represented 128,991 arrivals. Arrivals from the USA represented the bulk of arrivals from this region with a 321% increase.
- Collectively, Europe had the biggest percentage increase in arrivals of 563%. The total arrivals from Europe in January – June 2022 was 356,352.

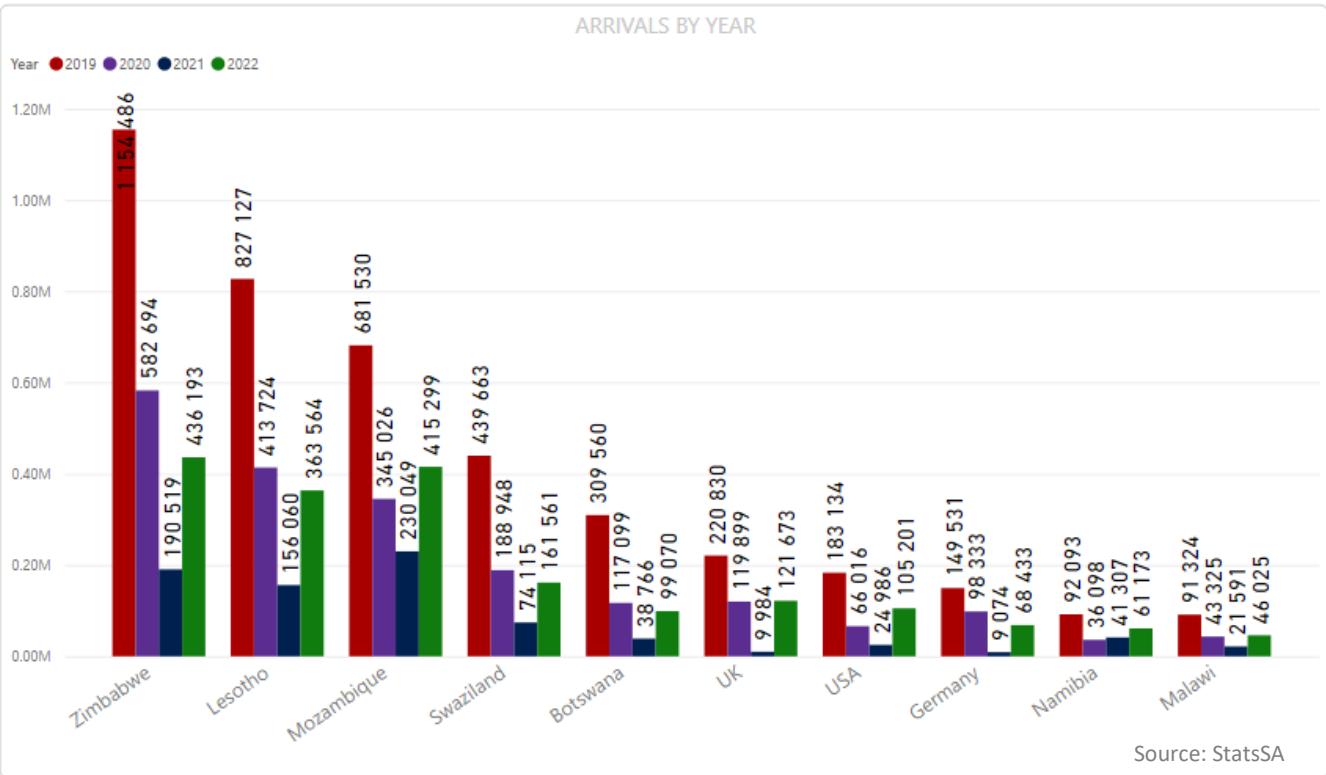


Total Arrivals – January – June 2022

- African Land arrival still account for the bulk of arrivals to South Africa.
- In 2022, the second biggest region in terms of arrivals is Europe followed by the Americas.



- In 2022 Zimbabwe accounted for most arrivals to South Africa.
- Mozambique followed closely in second place followed by Lesotho in 3rd place.
- The largest overseas market was the UK followed by the USA and then Germany.

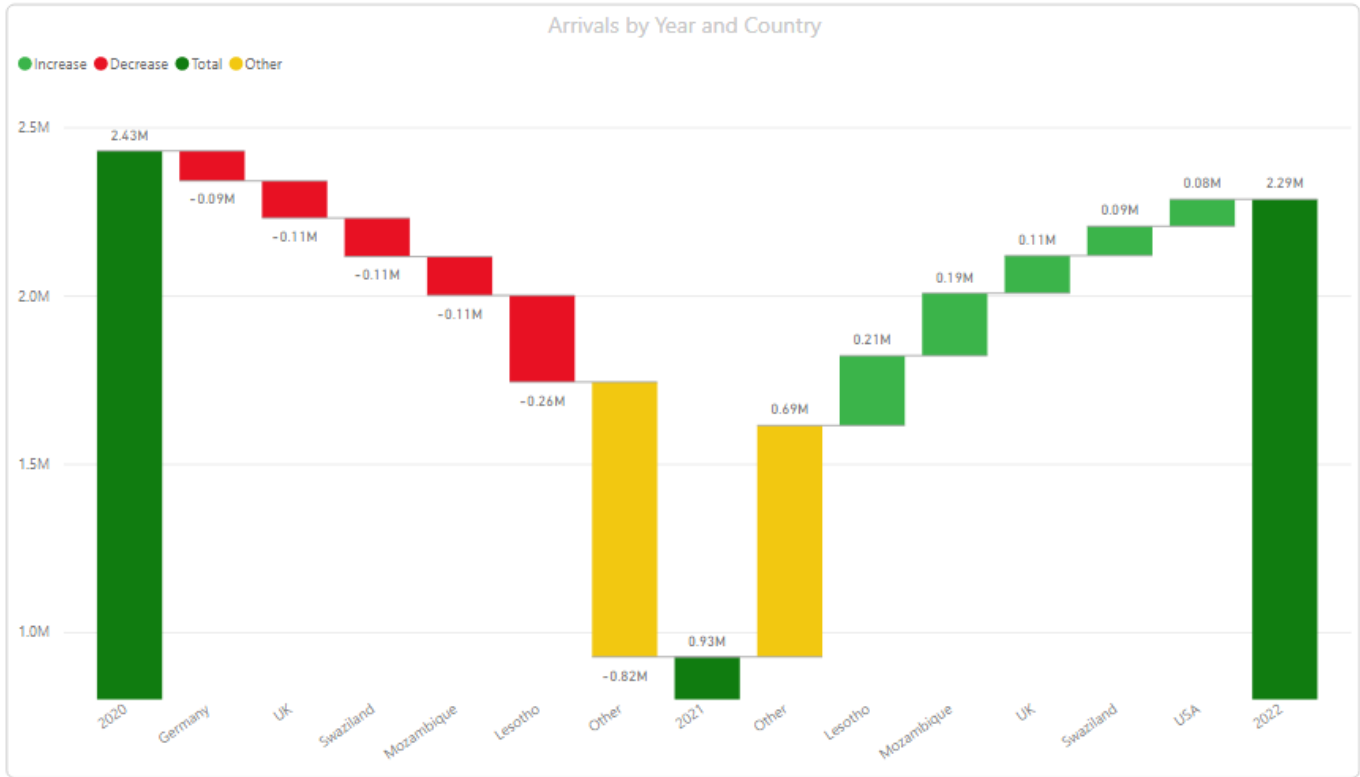


Key regions driving arrivals – Jan to Jun

- The region that drove the growth in arrivals between 2021 and 2022 was predominantly African land
- The second biggest region for growth was Europe and then the Americas .



- The top countries that drove growth between Jan-Jun 2021 and 2022 was Lesotho Mozambique and the UK respectively.



Seasonality and Projections for Recovery

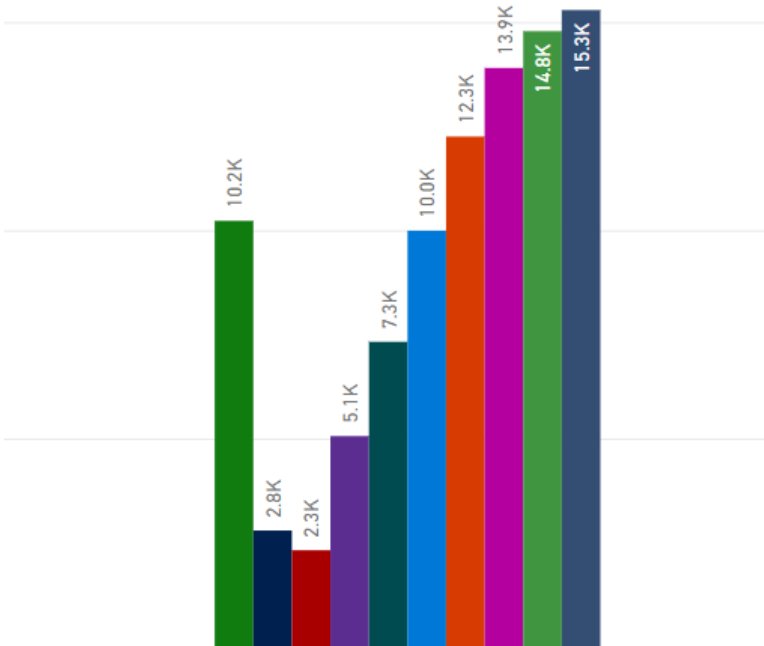
- The best performing month in 2022 was April driven by an increase in arrivals from Zimbabwe and Lesotho.
- 2022 is performing better than 2021 on a monthly basis but has still not reached 2019 levels
- it is expected that South Africa will reach 2019 levels in 2025.



Source: StatsSA

South Africa recovery - Oxford Projections

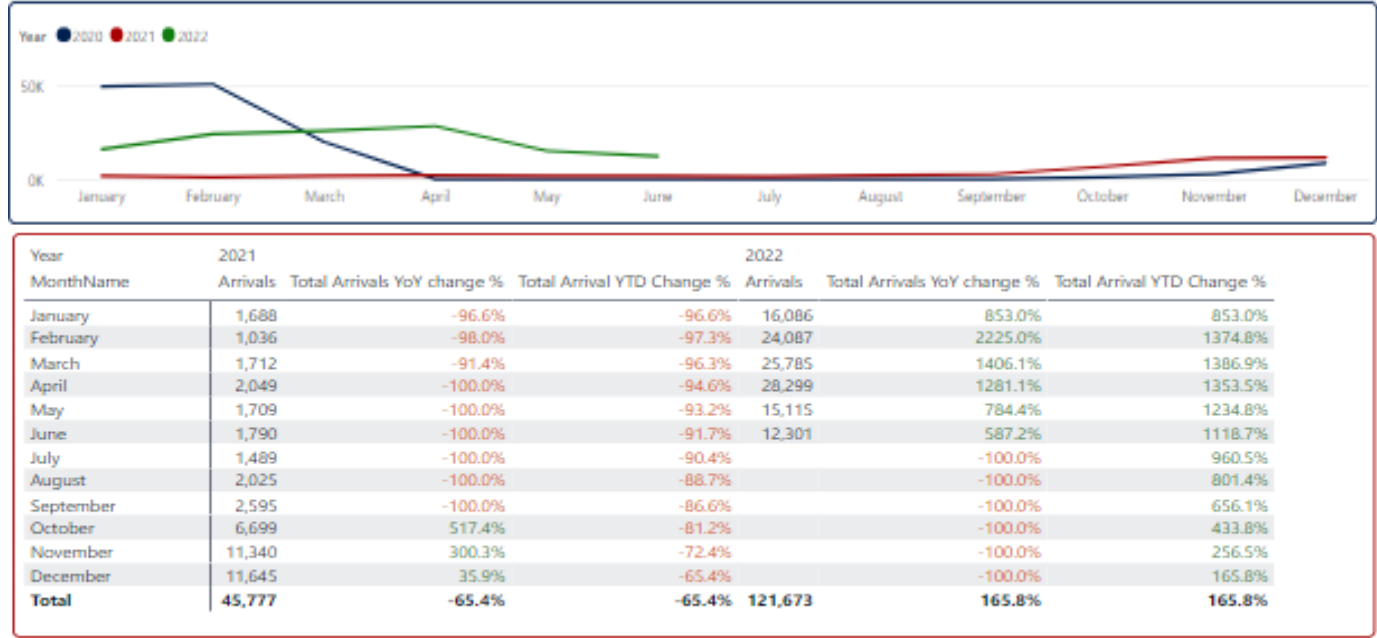
● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024 ● 2025 ● 2026 ● 2027 ● 2028



Source: Oxford Economics



KEY MEASURE PERFORMANCE (ARRIVALS)



June arrivals from the UK to South Africa saw positive growth of 587,2% compared to June 2021. Year to date arrivals are up by 1118,7% compared to 2021 arrivals. 2022’s Jan to June arrivals make up 55% of pre-Covid figures from 2019, same period. Year to date, June recorded lowest arrivals a further drop from May arrivals, compared to the other months. The decline may be attributed to seasonal changes, as at this stage European countries were in latter part of Spring.

<https://www.ft.com/content/ce361e70-d828-477f-a8b7-6f3fbf7e1c96>
<https://www.nytimes.com/interactive/2021/world/covid-vaccinations-tracker.html>
<https://ourworldindata.org/covid-vaccinations?country=GBRhttps://ourworldindata.org/covid-vaccinations?country=GBR>

Starting in November 2023, British travellers will have to obtain an ETIAS visa waiver every 3 years to travel to European Union member countries post-Brexit. The European Commission has confirmed that UK travellers can apply for the travel authorization once it is implemented in November.

Japan began a phased reopening in June, since which foreign tourists have been able to travel to the country on group trips or private tours. Independent travel is still not allowed. The cap on daily arrivals into Japan has increased from 20 000 to 50,000 arrivals, this update makes Japan a bit more accessible to Britons. First it was announced that its pre-departure Covid-19 test requirement would be dropped for fully vaccinated travellers and now, as of 7 September, tourists from the UK tourists are allowed to travel/visit without a guide. PCR tests are not required for travellers who are vaccinated, however, Japan authorities do not accept AstraZeneca. Travellers who are not fully vaccinated according to Japan’s rules can enter with a negative Covid-19 test taken up to 72 hours before departure. The proof of negative test result must have been signed and stamped by the laboratory where it was carried out. Visitors will still require tourist visas as Japan’s waiver system was suspended during the pandemic. Package travel providers should assist with the process of getting a visa.

British Airways has just launched a September sale on flights and holidays to Europe, USA and Caribbean. The offer is available for bookings from now until summer 2023. British Airways Holidays will also be running offers on flight and hotel packages, with deposits from £60 per person.

British Airways has announced cancellation of thousands of flights as it copes with airport passenger caps and lower than expected demand this winter. The airline has cancelled 629 short-haul round trips up to 29 October, and up to 10,000 short-haul flights from Heathrow, Gatwick and London City Airport will be called off from late October 2022 to March 2023, which is about 8% of BA’s flights up to March next year. The announcement follows the extension of Heathrow Airport’s daily passenger limit of 100,000 due to staff shortages.



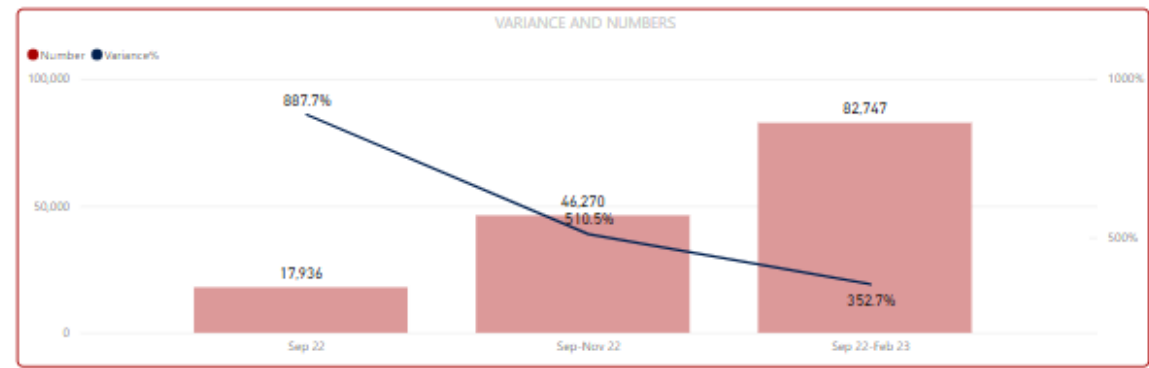
<https://inews.co.uk/news/ba-flights-cancelled-why-british-airways-flight-cancellations-explained-claim-compensation-1809801>

<https://www.express.co.uk/travel/articles/1666466/british-airways-september-sale-eact>

<https://www.etias.info/british-pay-fee-visit-europe-after-brex-it/>

<https://inews.co.uk/inews-lifestyle/travel/travel-japan-latest-holiday-rules-explained-tour-guide-requirement-1839259>

Note: The **Month** filter represents the month in which the report from Forward Keys was pulled. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months.



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WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
United Kingdom	21522

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
United Kingdom	17,936	887.7%	46,270	510.5%	82,747	352.7%

Disclaimer: The SA unit makes every effort to publish reports that are error-free. However with the large number of complex records that are analysed, we cannot guarantee that all reports are totally free of errors. All errors that are detected are immediately corrected.

As at 12 Sep 2022, there are 17 936 Forward Bookings for September 2022 from the UK to South Africa with a variance of 887,7% compared to same period last year. There are 82 747 bookings for months September 2022 to February 2023, up by 352,7% compared to same time last year. Most tickets were mostly bought directly with airlines (85%), with travellers preferring to book via British Airways (72%) and to a degree Virgin Active 8,3%) and Lufthansa (5,4%). Virgin Atlantic, London to Johannesburg started flying from 01 September 2022, and holds an average seat capacity of 283

VACCINE

There are currently no red list restrictions in place for travel. One doesn't have to take any tests or fill in any special forms to enter or re-enter the UK. This applies to both vaccinated and unvaccinated people.

TRAVEL ADVISORY

As of 30 Aug June 2022, the UK has administered 151 million vaccines, 53,8 million people (80,0%) have received at least 1 dose whereas 50,7 million people (75,5%) have been fully vaccinated or received two doses. UK's vaccination rate has since gone up to 226 from 255 shots per 100 people.

<https://www.africanews.com/2022/03/22/covid-south-africa-ends-pcr-tests-for-vaccinated-travelers/>

<https://testfortravel.com/covid19-country-travel-requirements/>

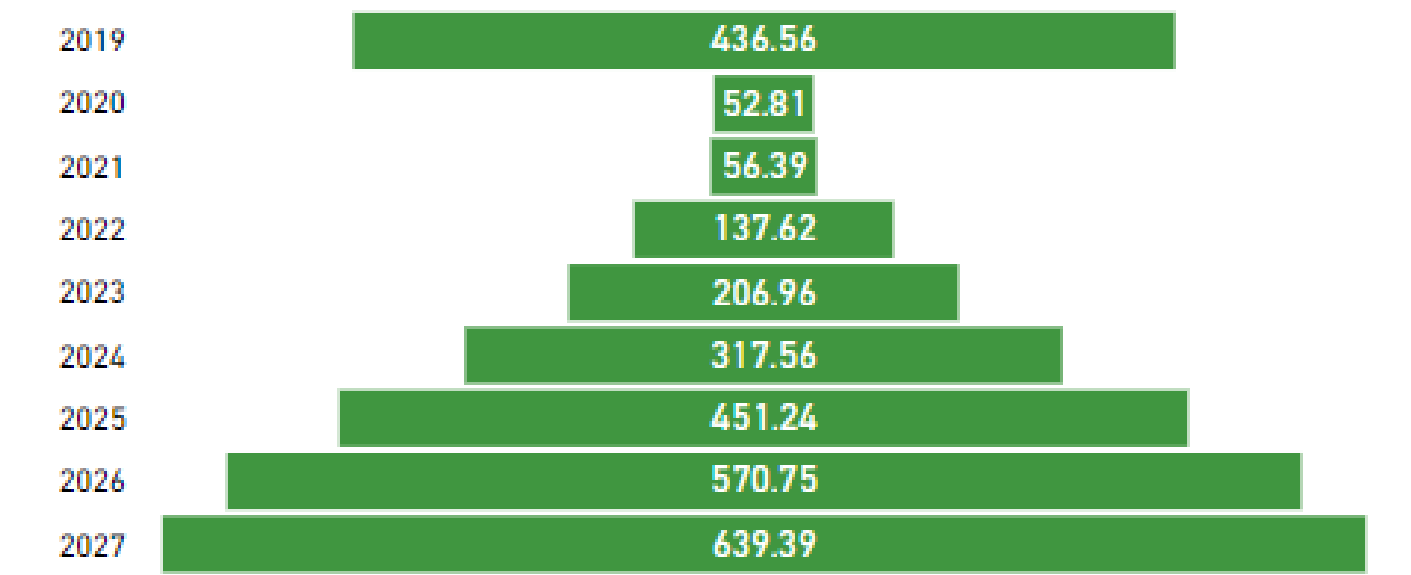
<https://www.thesouthafrican.com/travel/breaking-virgin-atlantic-cape-town-direct-flights-uk-sir-richard-branson-desmond-tutu-details-when-latest-news/>

<https://www.theguardian.com/world/2022/jul/04/whats-the-uks-booster-policy-ahead-of-a-feared-autumn-covid-wave>



OUTLOOK

Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Arrivals from the UK market are expected to catch up to pre-pandemic figures by 2025, reaching 451 240, revised down from 446 780 earlier in the year. The effects of the Russia / Ukraine war continues. UK arrivals are anticipated to reach 137 620 by end of 2022. According to Reuters and The Guardian, Consumer confidence in the UK is weaker than during the four major recessions of the past half century as rapidly rising inflation drains morale. Although the UK is technically yet to enter recession, the latest barometer of sentiment from GfK found the public gloomier than at any time since the survey began in January 1974. The monthly look at confidence found the relatively upbeat mood as Britain emerged from lockdown in 2021 had been replaced by deepening pessimism as the annual increase in the cost of living has climbed to a 40-year high of 10.1%.

[OxfordEconomics](https://www.reuters.com/world/uk/uk-consumer-sentiment-hits-record-low-inflation-soars-gfk-2022-08-18/)
<https://www.reuters.com/world/uk/uk-consumer-sentiment-hits-record-low-inflation-soars-gfk-2022-08-18/>
<https://www.theguardian.com/business/2022/aug/19/uk-consumer-confidence-weaker-than-during-major-recessions-inflation>

WHAT NEEDS TO BE DONE IN THE SHORT TERM?

Post the economic downturn, Brexit and the pandemic the British become more price-conscious, and they since developed a preference for travelling to long-haul destinations that offer value-for-money, destinations outside the Euro-zone that have a favourable currency exchange rate, cheaper flights, and lower cost living, also attract the British Pound. Furthermore, the Brits used to take about 2,5 international trips per annum, however, due to the uncertainty, the disturbance in regular travel, they have become heavy on domestic and regional travel. Active trade relations are critical in listing products that are aligned with current consumer needs. South Africa needs to maintain a presence on the relevant platforms and channels that consumers are most active on, to maintain a salience alongside other destinations



KEY MEASURE PERFORMANCE (ARRIVALS)

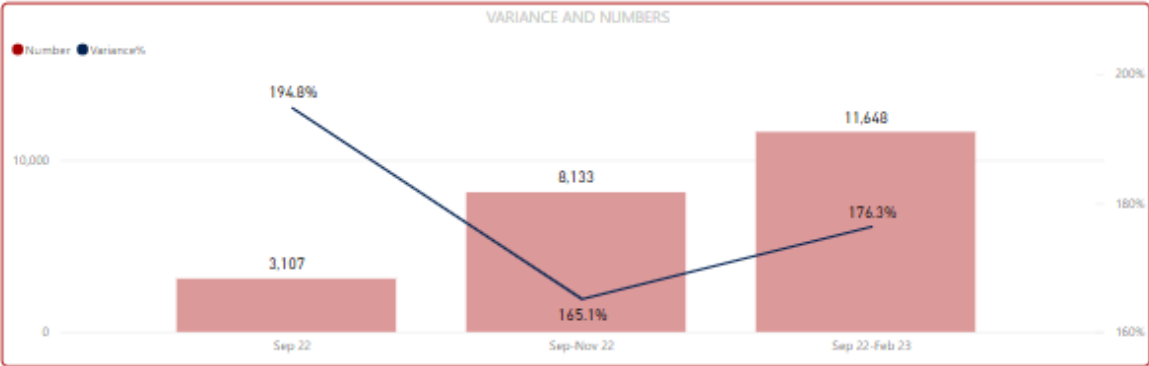


Year	2021			2022		
MonthName	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	1,128	-91.0%	-91.0%	2,314	105.1%	105.1%
February	570	-96.5%	-94.1%	5,499	864.7%	360.1%
March	893	-89.5%	-93.1%	5,679	535.9%	420.7%
April	1,088	-100.0%	-90.2%	6,950	538.8%	455.6%
May	1,153	-100.0%	-87.1%	5,459	373.5%	436.0%
June	721	-100.0%	-85.2%	3,603	399.7%	431.3%
July	861	-100.0%	-82.9%		-100.0%	360.0%
August	1,729	-100.0%	-78.3%		-100.0%	262.3%
September	1,772	-100.0%	-73.5%		-100.0%	197.6%
October	3,946	1043.8%	-63.3%		-100.0%	112.9%
November	4,479	485.5%	-52.5%		-100.0%	60.9%
December	1,421	-41.8%	-51.8%		-100.0%	49.3%
Total	19,761	-51.8%	-51.8%	29,504	49.3%	49.3%

Arrivals from France to South Africa saw growth of 399,7% in June 2022 compared to same month in 2021, and year to date, arrivals have gone up by 431,3% reaching 29 504. The current year to date arrivals figures are about 36,8% of pre-pandemic arrivals

BOOKINGS OUTLOOK

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WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
France	5329

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
France	3,107	194.8%	8,133	165.1%	11,648	176.3%

As at 12 September 2022, there are 3 107 Forward Bookings for September 2022 from France to South Africa, up by 195% compared to same period last year. There are 11 648 bookings for Sep to Feb 2023, up by 176% compared to Sep 2021 to Feb 2022.



<https://www.connexionfrance.com/article/French-news/Covid-19/Fourth-dose-of-Covid-vaccine-not-ruled-out-for-everyone-in-France>
<https://ourworldindata.org/covid-vaccinations?country=DEU>
<https://www.schengenvisainfo.com/news/travelling-to-europe-in-may-current-covid-vaccination-recovery-testing-rules-of-entry-for-every-eu-schengen-country/>
<https://www.nytimes.com/interactive/2021/world/covid-vaccinations-tracker.html>
<https://www.schengenvisainfo.com/news/travel-list-of-eu-countries-keeping-in-place-covid-restrictions-in-june-entry-rules-explained/>
<https://www.forbes.com/sites/alexledsom/2022/06/08/europe-travel-restrictions-covid-19-test-requirements-by-country-for-june/?sh=1c6948514d23>

For Sep to Feb forward bookings, 69% of tickets were bought directly with airlines, and 18% with traditional travel agencies, online TA accounted for 6,1%. Air France accounts for 52% capacity for the said period, KLM (11,3%) and British Airways (11,3%).

VACCINE

France has administered about 150 million doses of COVID vaccines as of 07 Sep 2022. According to our world in data group, 54,5 million people (80,9), who have received 1 dose of the vaccine. 53,0 million (78,7%) of France's population are fully vaccinated. France's vaccination rate is up, from 222 to 223 doses per 100 people

TRAVEL ADVISORY

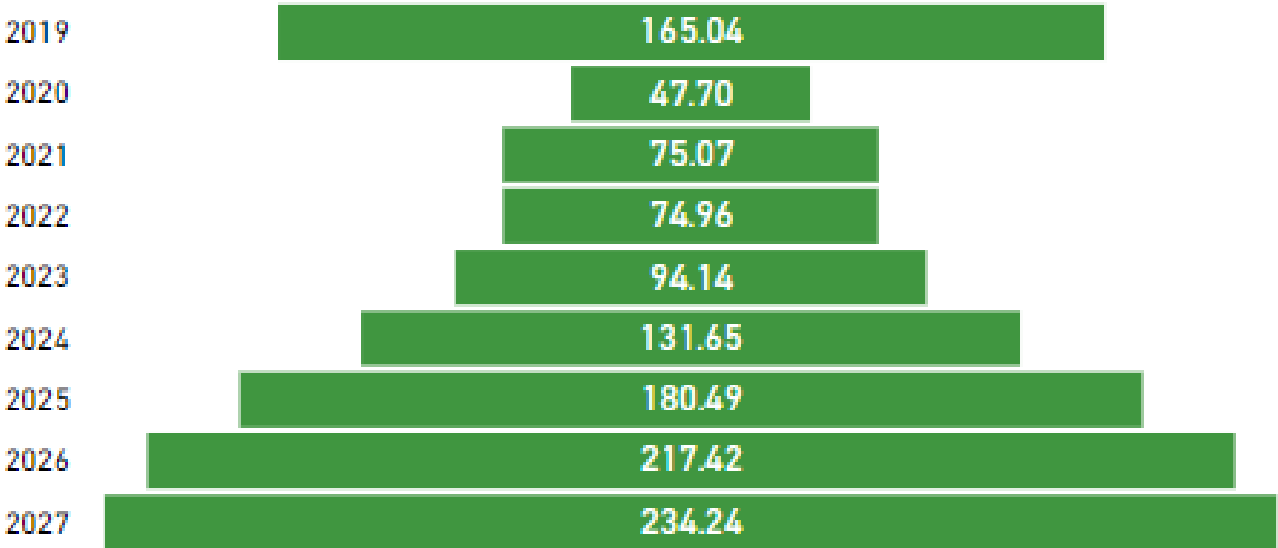
As of 01 August 1, 2022 (still valid on 12 Sep 2022), the rules previously applied to travelers to France no longer apply. Travelers no longer must complete any formalities before their arrival into France, in mainland France and overseas, travellers are also not required to present a health pass regardless of the country or zone of origin; no further proof of travel (would have been referred to as proof of compelling reason for travel) can be required. Travelers no longer must present a sworn statement of non-contamination and a commitment to undergo an antigenic test or a biological examination on arrival in the national territory. Similarly, no more justification of the reason for a trip departing from France, in mainland France or overseas, nor any certificate of leaving the territory is required by the French authorities to go to another country. In accordance with the law, the government finally retains until 31 Jan 2023 with the possibility of activating "emergency brake" measures for a maximum period of two months, in the event of an outbreak. and circulation of a new variant of Covid-19 likely to constitute a serious health threat or, in overseas territories, in the event of a risk of saturation of the health system.

<https://www.africanews.com/2022/03/22/covid-south-africa-ends-pcr-tests-for-vaccinated-travelers/>
<https://testfortravel.com/covid19-country-travel-requirements/>
<https://www.diplomatie.gouv.fr/fr/conseils-aux-voyageurs/informations-pratiques/article/coronavirus-covid-19>



OUTLOOK

Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



France has been forecasted to reach pre-pandemic arrivals figures by 2025. 2022 arrivals have since been revised up from 69 550 earlier this year to 74 960. 2022 arrivals are anticipated to record considerable growth from the slow growth of 2021.

The consumer confidence index in France unexpectedly edged higher to 82 in August of 2022. The index rose for the first time in 8 months. Although it remains well below the long-term average of 100. Slight improvements were seen for future savings capacity, propensity to save and the outlook for the standard living

<https://www.insee.fr/en/statistiques/6479067>



KEY MEASURE PERFORMANCE (ARRIVALS)

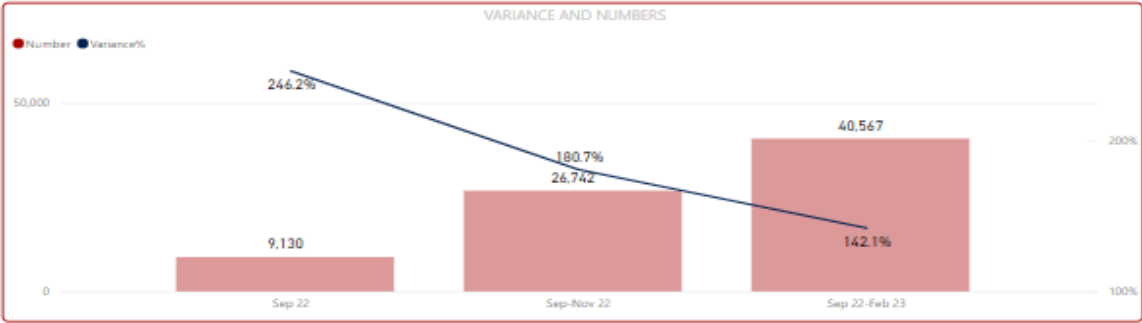


Year	2021				2022			
MonthName	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %
January	1,557		-95.6%	-95.6%	10,136		551.0%	551.0%
February	1,299		-96.9%	-96.3%	16,030		1134.0%	816.2%
March	2,082		-90.1%	-95.0%	16,362		685.9%	761.2%
April	1,772		-100.0%	-93.2%	14,251		704.2%	746.2%
May	1,304		-100.0%	-91.9%	6,269		380.8%	686.7%
June	1,060		-100.0%	-90.8%	5,385		408.0%	654.2%
July	1,204		-100.0%	-89.5%			-100.0%	565.8%
August	2,008		-100.0%	-87.5%			-100.0%	457.0%
September	3,614		-100.0%	-83.8%			-100.0%	330.4%
October	9,783		758.2%	-74.2%			-100.0%	166.5%
November	12,897		654.2%	-61.9%			-100.0%	77.4%
December	5,808		18.3%	-58.2%			-100.0%	54.2%
Total	44,388		-58.2%	-58.2%	68,433		54.2%	54.2%

Germany arrivals to South Africa saw a growth in June reaching 5 385, up from June 2021 figures by 408,0%. Year to date arrivals have gone up by 654,2% reaching 68 433.

BOOKINGS OUTLOOK

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Country	Past Arrivals
Germany	7922

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
Germany	9,130	246.2%	26,742	180.7%	40,567	142.1%

As of 4 September 2022, there were 9 130 Forward Bookings for Sep 2022 from Germany to South Africa, up by 246% compared to same period last year. There are 40 567 bookings for Sep to Feb 2023, up by 142% compared to period Sep 2021 to Feb 2022, 70,4% of tickets were bought directly with airlines, 11,1% retail travel agency and 6% via online. 74,0% of travellers have booked economy, whilst 19% will fly business.

Most bookings were done with Germany’s Lufthansa (65,6%), KLM (7,2%). Turkish Airways (4,3%) Leisure travel make up 72% of bookings, and 16,0% are travelling for the purposes of VFR and group travel make up 9%. Eurowing’s London to Mpumalanga leg starts in November 2022, which will run three times a week. Condor will also run a London/Johannesburg leg, from November which will run twice a week. Condor also introduced a Cape Town/London route, set to start in October, and will fly three times a week.

VACCINE

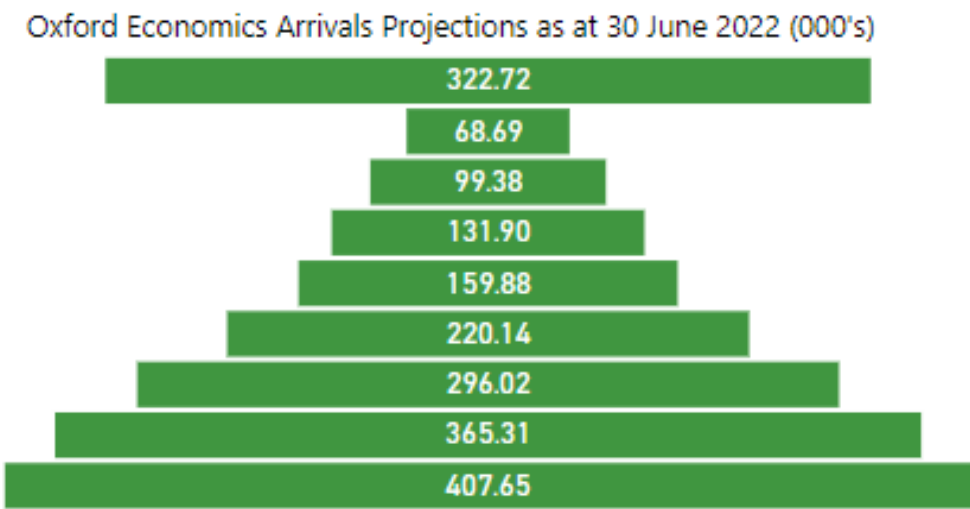
Germany has administered around 185 million doses (11 Sep 2022) of COVID vaccines, moving from 184 million around the same time last month. 77,8% of Germany’s population has received atleast 1 dose of the vaccine, this tallies up to 64,7 million, 76,2% (63,4 million) of the population having been fully vaccinated. Germany’s rate of vaccination per 100 has moved up to 22 doses per 100 people, from 221 previous month.

TRAVEL ADVISORY

From Saturday, 11 June 2022 (still relevant and true on 12 Sep 2022), all COVID-19-related restrictions for entry into Germany have been lifted. You can travel to Germany for all travel purposes, including tourism and visits, without restrictions. However, if you are resident in China, you will need an important reason for travelling to Germany.

<https://travelbans.org/en/europe/germany/full-restrictions>

OUTLOOK



German arrivals are anticipated to reach pre-pandemic figures by 2026 reaching 367 020, earlier in the year, Germany was set to reach pre-pandemic figures by 2025, the downward revision is attributed to the Russia/Ukraine invasion. Germany’s consumer confidence indicator was -24.10% in August of 2022. The Germans' propensity to save increased by 17.6 points compared to previous month, recording highest value in more than eleven years. This is spurred by fear of looming higher energy costs in the coming months, and thus forcing households to put money aside in order to foot future energy bills

<https://tradingeconomics.com/germany/consumer-confidence-indicator-eurostat-data.html#:~:text=Germany%20%2D%20Consumer%20confidence%20indicator%20was,25.20%25%20in%20July%20of%202022.>
<https://www.gfk.com/press/sharp-increase-in-propensity-to-save-severely-impacts-consumer-sentiment>



WHAT NEEDS TO BE DONE IN THE SHORT TERM?

Germany now has 5 airlines flying into South Africa, efforts can be targeted at continued positivity messaging, to win those who are aware but are not positive about South Africa and to also make available content in the right channels to drive sales for those who are shopping for post pandemic holiday travel.



KEY MEASURE PERFORMANCE (ARRIVALS)

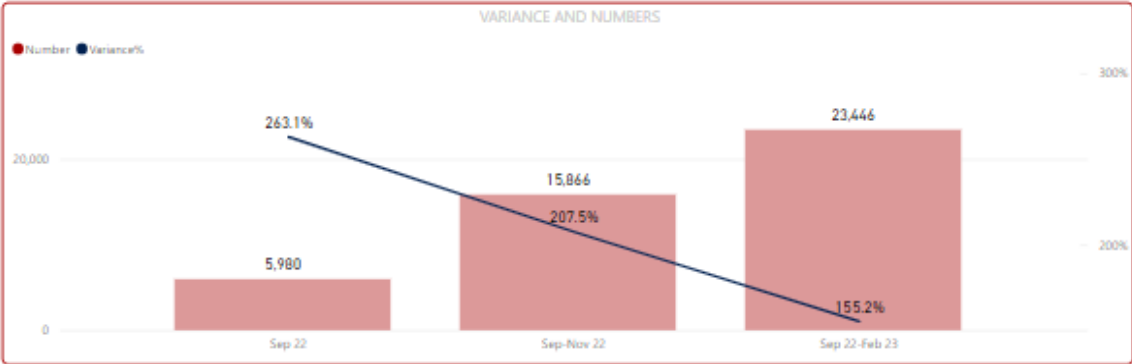


Year	2021			2022		
MonthName	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	620	-95.1%	-95.1%	5,608	804.5%	804.5%
February	395	-97.1%	-96.1%	6,483	1541.3%	1091.2%
March	685	-88.0%	-94.7%	5,272	669.6%	921.4%
April	1,009	-100.0%	-91.5%	7,671	660.3%	824.1%
May	848	-100.0%	-88.9%	3,789	346.8%	710.3%
June	733	-100.0%	-86.6%	2,956	303.3%	640.8%
July	1,076	-100.0%	-83.2%		-100.0%	492.2%
August	1,231	-100.0%	-79.4%		-100.0%	381.7%
September	1,723	-100.0%	-74.0%		-100.0%	282.0%
October	3,679	1595.4%	-62.8%		-100.0%	164.8%
November	4,786	539.8%	-49.1%		-100.0%	89.3%
December	4,972	144.8%	-37.9%		-100.0%	46.1%
Total	21,757	-37.9%	-37.9%	31,779	46.1%	46.1%

Arrivals from the Netherlands to South Africa saw a significant increase in June 2022 compared to previous year same month. Arrivals are up from 733 in June 2021, to 2 956 in the current year. Year to date arrivals are up by 740,8% reaching 31 779.

BOOKINGS OUTLOOK

Note: The **Month** filter represents the month in which the report from Forward Keys was pulled. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months.



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WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
Netherlands	6383

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
Netherlands	5,980	263.1%	15,866	207.5%	23,446	155.2%



NETHERLANDS

As of 04 September 2022, there are 5 980 Forward Bookings for September 2022 from Netherlands, the number of bookings recorded for Sep 2022 are up by 263,1% compared to same period last year. The Dutch have also booked 23 446 tickets, for arrival into South Africa between Sep 2022 and Feb 2023. The number of bookings for this period is up by 155,2% compared to same period last year onto Feb 2022.

78,9% of tickets were bought directly with airlines, 8,7% were bought via an online travel agency and 6,4% with traditional travel agencies

VACCINE

Netherlands has administered about 36,1 million* doses of COVID vaccines; 12,9 million people (74,3%) have received 1 dose of the vaccine and 12,1 million are fully vaccinated. Netherlands vaccination per 100 people is now 208 at per 100 people. (*Last updated 02 Sep 2022, there are inconsistencies in Netherlands reporting of vaccination figures – Sep figures came in lower than previous months)

TRAVEL ADVISORY

South Africa is coded yellow (non-covid coding), alluding to there being some degree of risk when travelling to South Africa, and caution is advised to those travelling to South Africa. Travellers are particularly warned about crime in South Africa and to be always vigilant when in South Africa, some of the advisory includes the following; Travellers are advised -

To not go out on the streets after sunset. To be informed about the local security situation. This can vary greatly from district to district.

To know where you are and where you are going. Don't make a lost impression.

To not take any valuables outside such as jewellery, mobile phones, cameras, expensive clothing, cash, etc. If you do, keep it out of sight.

To carry money, credit cards and other valuable documents discreetly on your body

To not lose sight of your belongings.

To not resist a robbery or robbery. If you become a victim of this, hand over your belongings. Resistance often creates (more) violence.

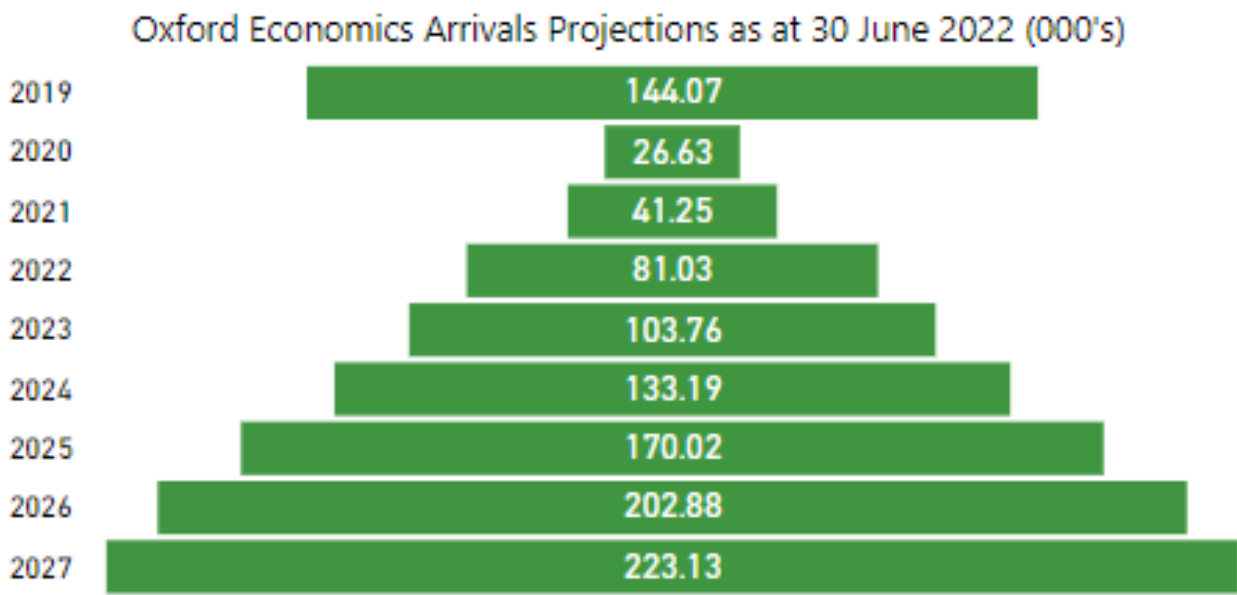
<https://www.nederlandwereldwijd.nl/reisadvies/zuid-afrika>

https://ourworldindata.org/covid-vaccinations?country=OWID_WRL

<https://www.nytimes.com/interactive/2021/world/covid-vaccinations-tracker.html>



OUTLOOK



Netherlands arrivals are expected to reach pre-pandemic figures by 2025, reaching 170 020 arrivals revised up from 168 310. 2022 arrivals are foreseen to contribute 81 030 from this market.

Netherland’s consumer confidence indicator hit a record low of -51 in July of 2022 from -50 in the previous month. Consumer’s willingness to buy hit the lowest ever (-38 vs -37), with their views about both the financial situation in the past twelve months (at -37) and their assessment of the financial situation in the next twelve months remaining on the pessimistic end.

Oxford Economics
<https://tradingeconomics.com/netherlands/consumer-confidence>

WHAT NEEDS TO BE DONE IN THE SHORT TERM?

Environmental regeneration is important to this market, Dutch consumers are highly interested in positive environmental preservation and output, and this impacts their buying behaviour. Conscious consumerism is also a growing trend in this market. Dutch consumers are price-sensitive and are looking for new ways to save money especially in the current climate with high inflation, high fuel prices. Affluent Dutch consumers appreciate well-made products with value-added features therefore, value for money is important for this market, and when focusing on conversion further down the funnel, price should be a consideration. Deals partnering should happen with sustainability brands that consumers have an affinity to such as the Water Bear. Our messaging should continue to align to the sustainability messaging and showcase options and packages that convey value for money.



KEY MEASURE PERFORMANCE (ARRIVALS)

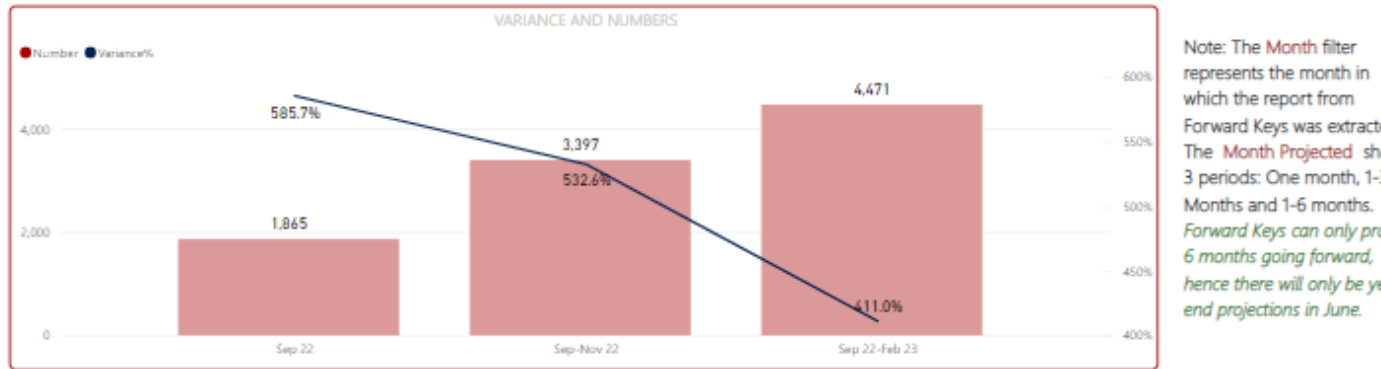


Year	2021			2022		
	MonthName	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %
	January	299	-93.6%	-93.6%	821	174.6%
	February	229	-94.8%	-94.2%	1,178	414.4%
	March	346	-68.3%	-91.4%	1,689	388.2%
	April	431	-100.0%	-87.2%	1,900	340.8%
	May	377	-100.0%	-83.5%	1,753	365.0%
	June	423	-100.0%	-79.4%	1,859	339.5%
	July	462	-100.0%	-74.9%		-100.0%
	August	594	-100.0%	-69.0%		-100.0%
	September	587	-100.0%	-63.3%		-100.0%
	October	942	417.6%	-54.9%		-100.0%
	November	1,224	275.5%	-44.8%		-100.0%
	December	662	-8.9%	-42.6%		-100.0%
	Total	6,576	-42.6%	-42.6%	9,200	39.9%

June arrivals from Italy to South Africa recorded growth of 339,5% compared to same month in 2021, reaching 1 859 arrivals in 2022. Year to date arrivals are up by 337,1% recording 9 200 arrivals.

BOOKINGS OUTLOOK

Note: The **Month** filter represents the month in which the report from Forward Keys was pulled. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months.



WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals		Month projected		Sep 22		Sep-Nov 22		Sep 22-Feb 23	
			Country		Number	Variance%	Number	Variance%	Number	Variance%
Italy		5295	Italy		1,865	585.7%	3,397	532.6%	4,471	411.0%

Disclaimer: The SIA unit makes every effort to publish reports that are error-free. However with the large number of complex searches that are analysed, we cannot guarantee that all reports are totally free of errors. All errors that are detected are immediately corrected.

The number bookings for the rest of the year (Sep to Feb) are up 441% compared to same period last year onto Feb 2023, recording 4 471 Forward Bookings. There are no direct flights from Italy to South Africa. Airlines with the highest share in market for Sep to Feb 2023 Forward Bookings, travelling to South Africa are British Airways (19,1%), Emirates (17,1%), and Air France (10,6%).



VACCINE

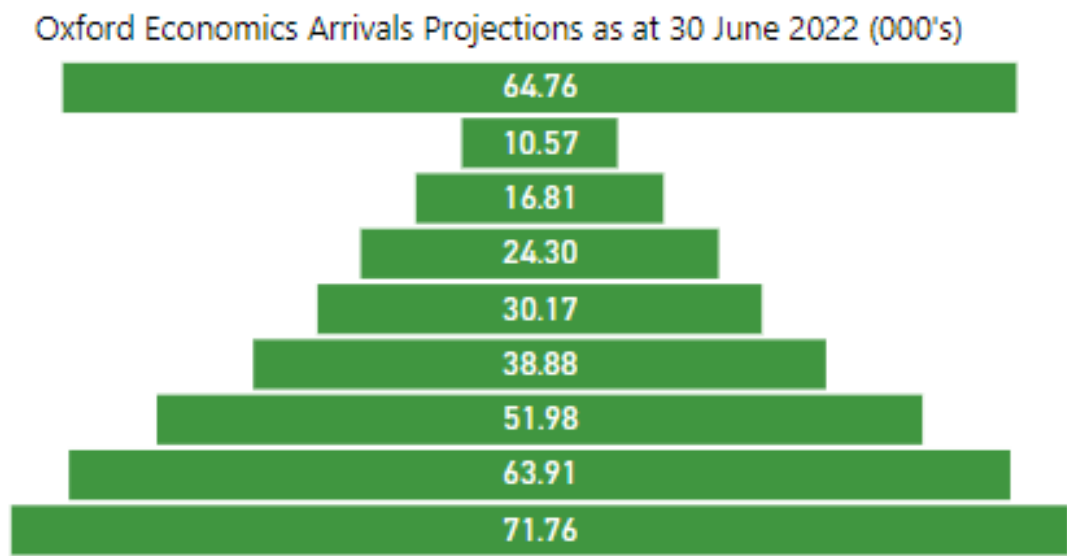
Italy has administered about 140 million doses of COVID vaccines as of 12 August 2022. 50,8 million people (85,4%) have received 1 dose of the vaccine and 47,9 million (80,5%) have been fully vaccinated.

TRAVEL ADVISORY

The Italian government has dropped all COVID-related travel restrictions, this became effective on 31 May 2022. (this is still true and valid on 12 Sep 2022)

<https://www.africanews.com/2022/03/22/covid-south-africa-ends-pcr-tests-for-vaccinated-travelers/>
<https://www.salute.gov.it/portale/nuovocoronavirus/dettaglioContenutiNuovoCoronavirus.jsp?lingua=english&id=5412&area=nuovoCoronavirus&menu=vuoto>

OUTLOOK

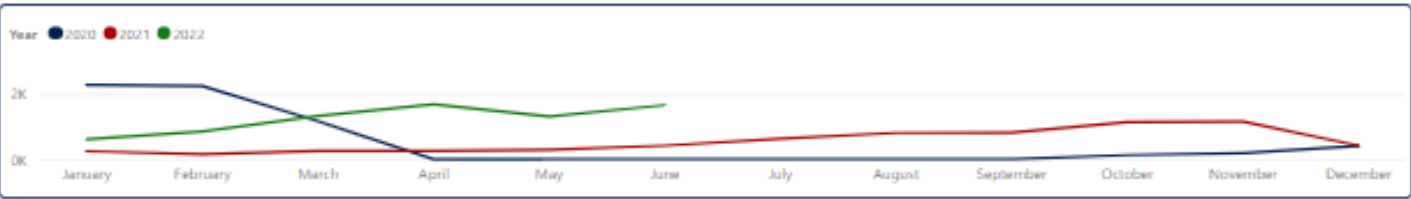


Italy arrivals are likely to reach pre-pandemic figures by 2026. Arrivals are anticipated to reach 63 910 by close of 2026, a slight downward revision from a 64 570 projection, from earlier in the year.

Oxford Economics
<https://www.reuters.com/world/europe/italy-business-consumer-confidence-morale-fall-july-political-instability-2022-07-27/>
<https://www.focus-economics.com/countries/italy/news/consumer-confidence/consumer-confidence-falls-in-june>



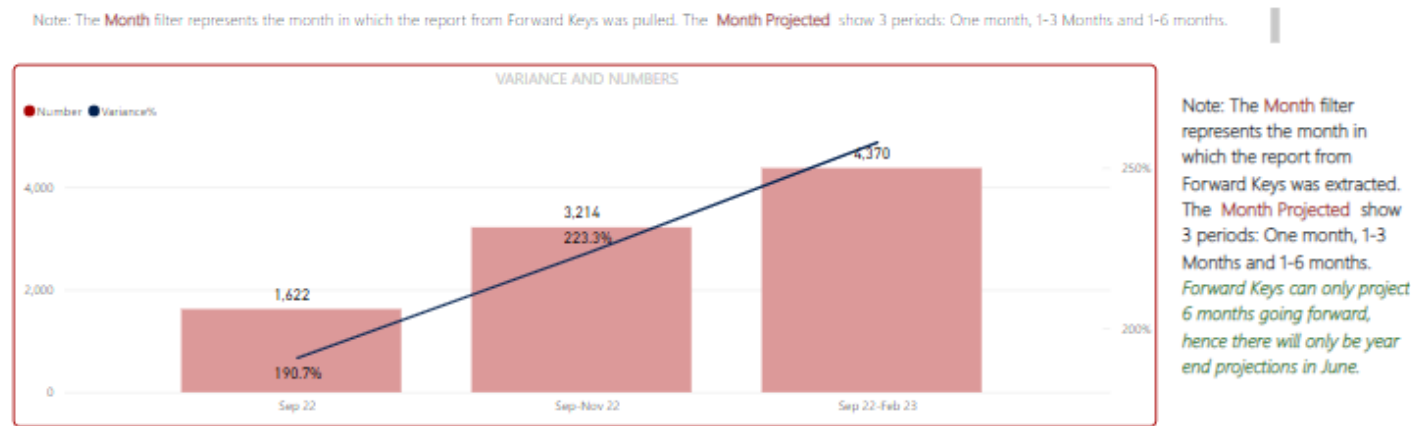
KEY MEASURE PERFORMANCE (ARRIVALS)



Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	248	-89.1%	-89.1%	615	148.0%	148.0%
February	152	-93.2%	-91.1%	848	457.9%	265.8%
March	262	-77.5%	-88.3%	1,329	407.3%	321.8%
April	262	-100.0%	-83.7%	1,673	538.5%	383.2%
May	298	-100.0%	-78.4%	1,311	339.9%	372.7%
June	419	-100.0%	-71.0%	1,652	294.3%	352.7%
July	636	-100.0%	-59.8%		-100.0%	226.2%
August	806	-100.0%	-45.6%		-100.0%	140.9%
September	818	-100.0%	-31.2%		-100.0%	90.4%
October	1,135	766.4%	-13.2%		-100.0%	47.5%
November	1,157	525.4%	3.5%		-100.0%	19.9%
December	416	0.2%	3.3%		-100.0%	12.4%
Total	6,609	3.3%	3.3%	7,428	12.4%	12.4%

Arrivals from Spain to South Africa recorded positive growth of 294,3% for June 2022 when compared to same month in 2021. Year to date arrivals are up by 352,7%, up from 1 222 in 2021 to 7 428

BOOKINGS OUTLOOK



WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
Spain	3357

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
Spain	1,622	190.7%	3,214	223.3%	4,370	257.9%

Forward bookings for Sep add upto 1 622, recording a 190,7% increase in bookings compared to last year's bookings same period. Sep to Feb bookings are sitting at 4 370, up by 257,9% compared to same period last year.



46,6% (Sep to Feb 2023 bookings) of ticket sales were done through airlines, whilst another 29,4% was via traditional travel agencies, and 12,5% through online travel agencies. Spain does not have direct flights to South Africa, bookings for Sept to Feb 2023 are done Qatar (18,3%), British Airways (15,4%) and Lufthansa (10,95).

Economy class attributes to 81,1% of all bookings done in this period, and 8,9% of bookings are done in business class. Group travel is 17% for this period, and leisure travel makes up 71,9%

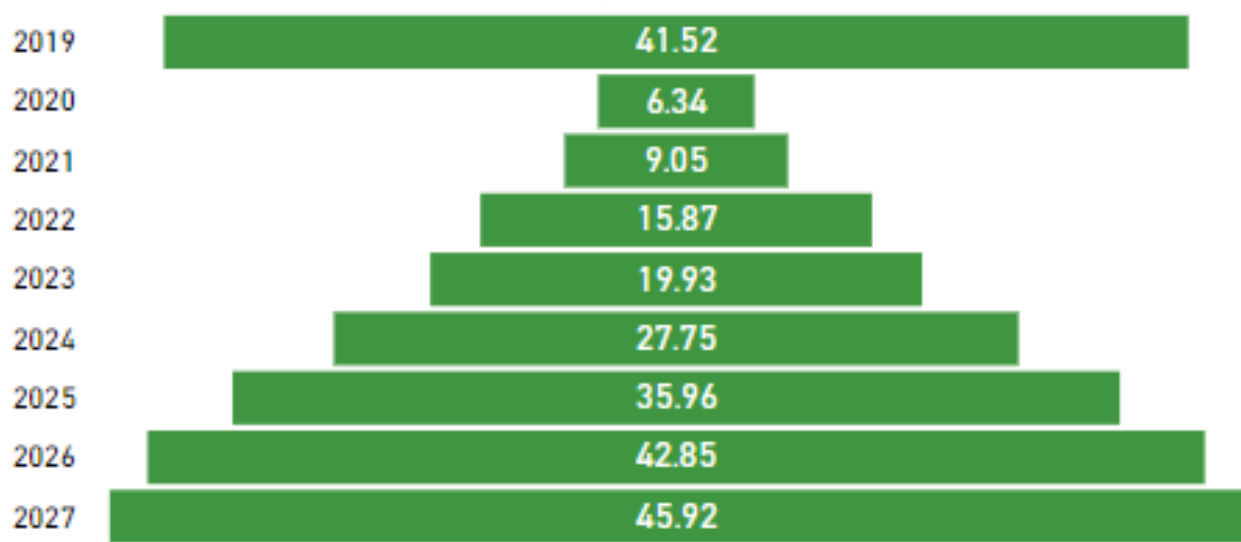
TRAVEL ADVISORY

There are no countries listed as risk countries/territories or areas on Covid-19 related restrictions. Those who are non-EU citizens, are required to produce proof of vaccination, proof of recovery or proof of negative test, upon re-entry into Spain.

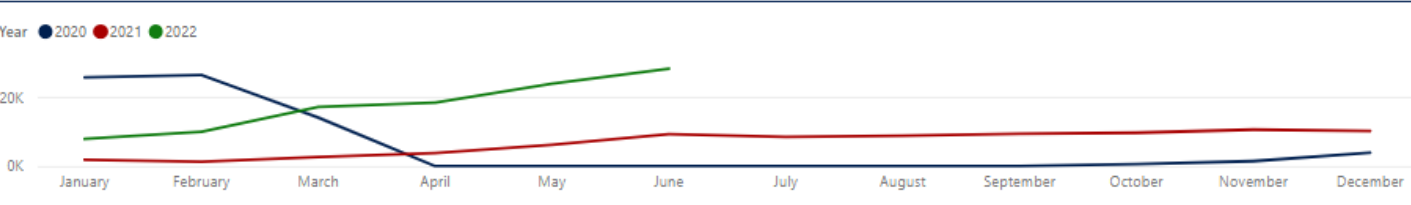
<https://www.africanews.com/2022/03/22/covid-south-africa-ends-pcr-tests-for-vaccinated-travelers/>
<https://testfortravel.com/covid19-country-travel-requirements/>
<https://www.sanidad.gob.es/en/profesionales/saludPublica/ccayes/alertasActual/nCov/spthRequisitosEntradaEspana/home.htm>

OUTLOOK

Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Spain arrivals are expected to reach pre-pandemic figures by 2026, reaching about 42 850 arrivals, and likely to exceed 2019 figures by about 1330 more arrivals. Significant growth is expected leading to 2026 from this market.



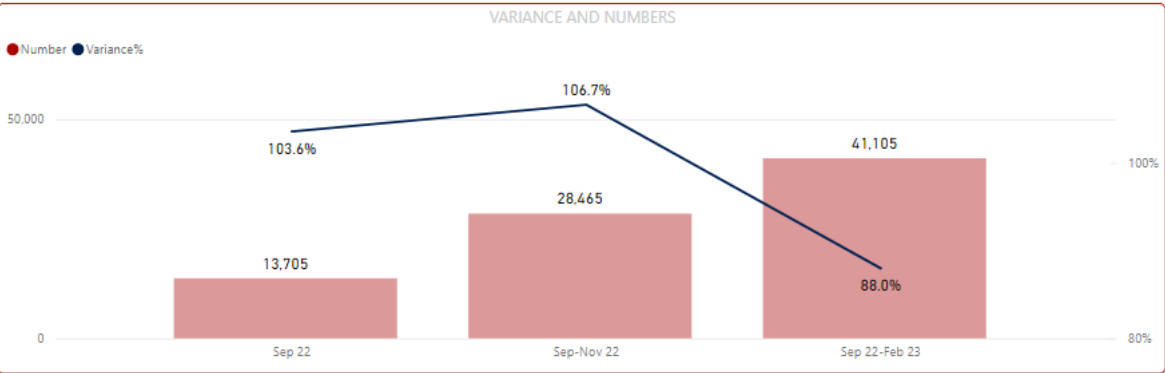
Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	1,844	-92.8%	-92.8%	7,861	326.3%	326.3%
February	1,241	-95.3%	-94.1%	9,928	700.0%	476.6%
March	2,657	-81.1%	-91.3%	17,092	543.3%	507.5%
April	3,763	-100.0%	-85.6%	18,324	387.0%	459.8%
May	6,175	-100.0%	-76.2%	23,789	285.2%	391.0%
June	9,306	-100.0%	-62.2%	28,207	203.1%	321.0%
July	8,445	-100.0%	-49.4%		-100.0%	214.7%
August	8,808	-100.0%	-36.0%		-100.0%	149.1%
September	9,391	-100.0%	-21.8%		-100.0%	103.8%
October	9,661	1473.5%	-8.0%		-100.0%	71.6%
November	10,572	625.1%	5.5%		-100.0%	46.4%
December	10,157	162.4%	14.0%		-100.0%	28.3%
Total	82,020	14.0%	14.0%	105,201	28.3%	28.3%

The first half of 2022 has been very positive with strong growth in each month. Year-to-date arrivals are 321% above the same period in 2021. Despite the strong growth arrival remain at just 57% of the 2019 half-year arrivals.

Forward bookings for the next 3 months show a 106.7% increase compared to bookings in the same period 2021. The outlook for the next 6 months of 2022 is significantly lower than the next 3 months. The largest tickets from the US are purchased in the US, with other bookings from South Africa, the UK, Canada, Germany, and Sweden. Similarly, not all bookings are on direct airlines, with connections in Europe, the Middle East, and Ethiopia (Dar es Salaam). Popular airlines include KLM, Lufthansa, Emirates, and Ethiopian Airlines.

BOOKINGS OUTLOOK

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WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
U.S.A.	13779

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
U.S.A.	13,705	103.6%	28,465	106.7%	41,105	88.0%



CONTEXT

Travel spending was roughly at 2019 levels in July, which marked the fourth consecutive month that spending, was at, or above, 2019 levels. According to Morning Consult’s recently released State of Travel and Hospitality, as of July, 36% of Americans plan to travel in the next three months, down from 39% in April. The return of business travel continues to be uneven. According to STR, company policy is limiting corporate business travel demand—not employee desire. Overseas visitation picked up its pace of growth at the start of the summer—recovering from -41% in June to -35% in July—but remains far behind pre-pandemic levels.

The U.S. Department of Transportation today issued a Notice of Funding Opportunity (NOFO) announcing the availability of over \$1.4 billion in Consolidated Rail Infrastructure and Safety Improvement (CRISI) Grant funding. The CRISI Program, which is administered by the Federal Railroad Administration (FRA), advances projects that modernize America’s freight and passenger rail infrastructure, allowing people and goods to move more safely and efficiently and helping make goods more affordable for American families. “Projects funded by these CRISI grants will generate economic opportunities and improve the travel experience in communities across America, whether urban or rural, large or small,” said FRA Administrator Amit Bose.

<https://www.ustravel.org/research/monthly-travel-data-report>
<https://www.transportation.gov/biden-harris-administration-usdot-make-unprecedented-14-billion-rail-grants>

TRAVEL ADVISORIES

CDC will no longer require air passengers traveling from a foreign country to the United States to show a negative COVID-19 viral test or documentation of recovery from COVID-19 before they board their flight. Make sure you are vaccinated and up to date with your COVID-19 vaccines before traveling to South Africa. Travel Advisory last update July 18, 2022 - Alert Level 2, Practice Enhanced Precautions.

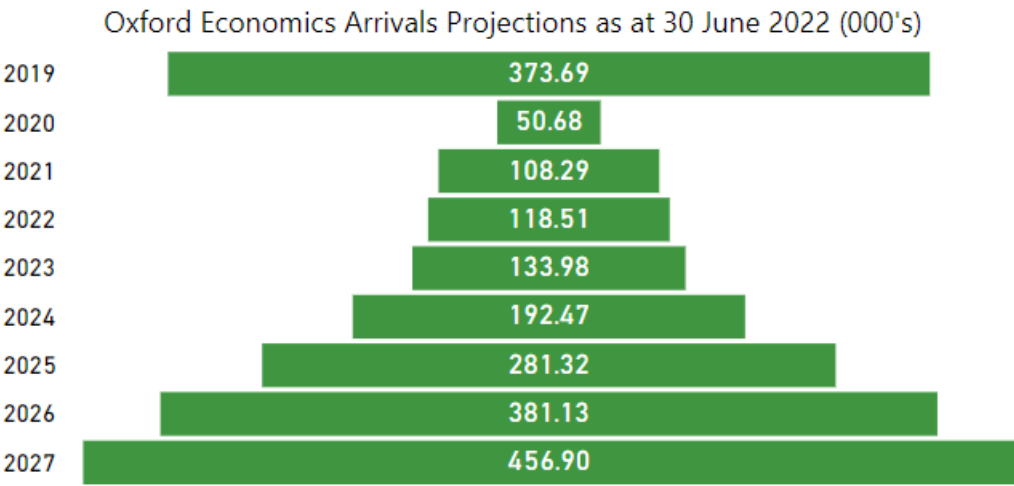
Country Summary: Violent crime, such as armed robbery, rape, carjacking, mugging, and "smash-and-grab" attacks on vehicles, is common. There is a higher risk of violent crime in the central business districts of major cities after dark. Demonstrations, protests, and strikes occur frequently. These can develop quickly without prior notification, often interrupting traffic, transportation, and other services; such events have the potential to turn violent.

<https://wwwnc.cdc.gov/travel/destinations/traveler/none/south-africa>
<https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories/south-africa-travel-advisory.html>

VACCINES

As of the 9th of September 2022, approximately 79% of the U.S. population has received at least one dose of the vaccine and 68% of the U.S. population has been fully vaccinated. As of 7th September 2022, there were 25 686 new Covid-19 cases recorded in the U.S.; the United States continues to have the highest number of Covid-19 cases globally and is at just over 1 million Covid deaths.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/amro/country/us>



[Open in Power BI](#) projections oxford

Arrivals from the USA are expected to recover to 2019 levels in 2026. The 2022 arrival expectations are for 118 510 tourist arrivals, up 9% from 2021. The projections are well behind the actual growth in the first quarter of 2022.

Consumer Confidence Index® increased in August, following three consecutive monthly declines. The Index now stands at 103.2 (1985=100), up from 95.3 in July. The Present Situation Index—based on consumers’ assessment of current business and labor market conditions—improved to 145.4 from 139.7 last month. The Expectations Index—based on consumers’ short-term outlook for income, business, and labor market conditions—increased to 75.1 from 65.6.

“Consumer confidence increased in August after falling for three straight months,” said Lynn Franco, Senior Director of Economic Indicators at The Conference Board. “The Present Situation Index recorded a gain for the first time since March. The Expectations Index likewise improved from July’s 9-year low, but remains below a reading of 80, suggesting recession risks continue. Concerns about inflation continued their retreat but remained elevated.” “Meanwhile, purchasing intentions increased after a July pullback, and vacation intentions reached an 8-month high. Looking ahead, August’s improvement in confidence may help support spending, but inflation and additional rate hikes still pose risks to economic growth in the short term.”

<https://www.conference-board.org/topics/consumer-confidence>

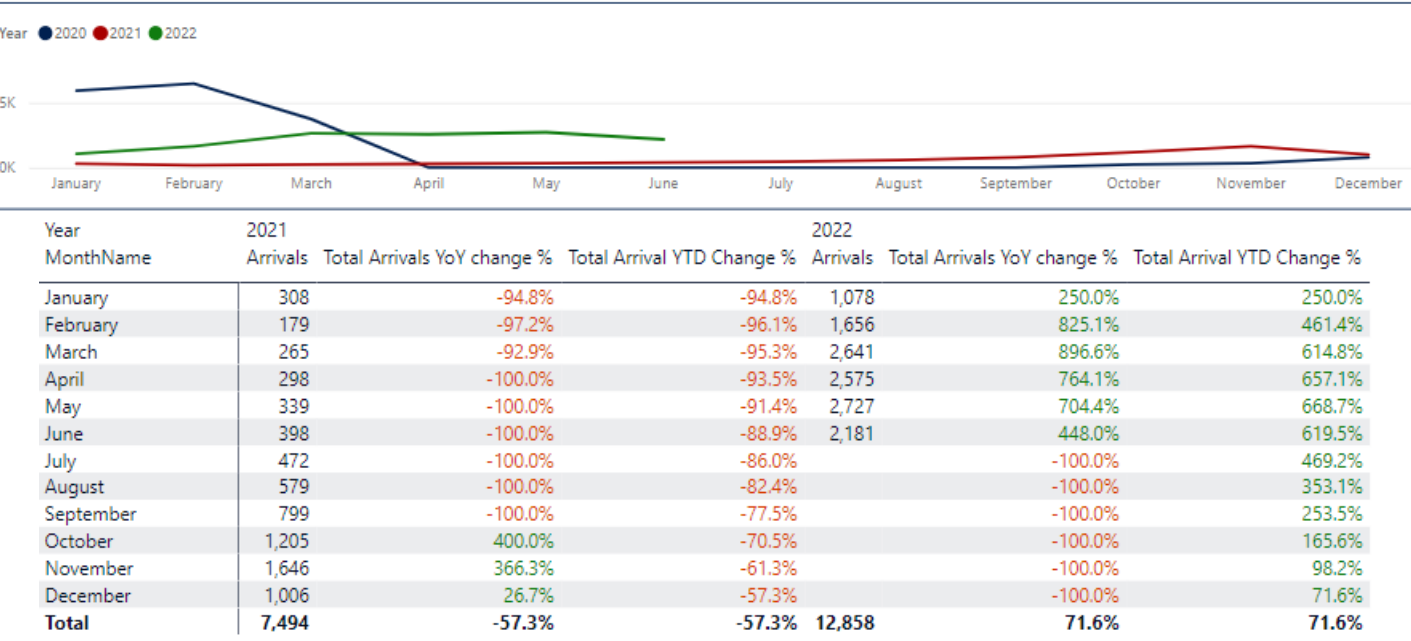
WHAT NEEDS TO HAPPEN – SHORT TERM (2022)

Following the summer travel season, the US is preparing for the year-end holiday season with a localized Live Again for flying from September 2022 to November 2022. The campaign will be followed up with a conversion campaign for January 2023 to the end of the Financial year. Backing the above with an always-on digital campaign including owned social platforms. Beyond the campaigns above the line, there are niche consumer associations and collaborations with trade and airlines. Women in tourism spotlight in trade webinars. Engagements with Association of Black travel professionals in lead up to IMEX America in November.

A potential route to a market study slated for Q4 should budget allow for understanding the consumer and trade environment post covid and to understand the insights among the younger demographic segments (Gen Z) and up and up-and-coming Gen A.



KEY MEASURE PERFORMANCE

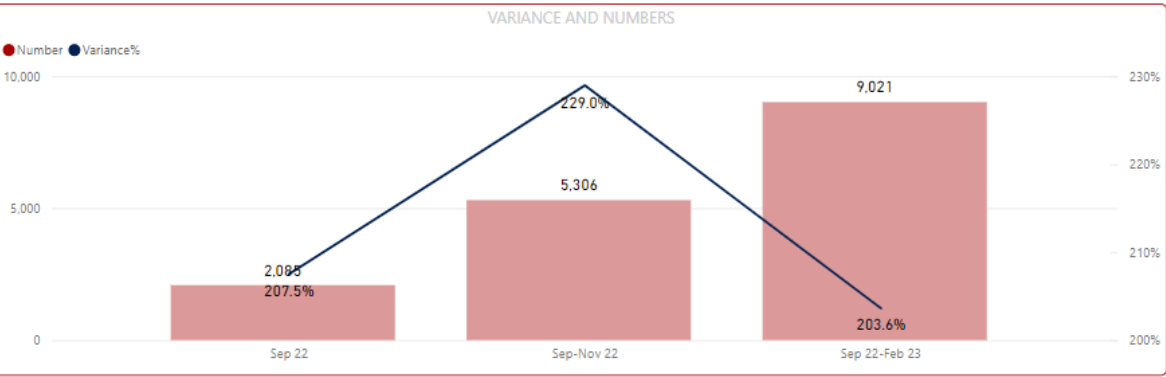


The first half of 2022 has been very positive with strong growth in each month. Year-to-date arrivals are 620% above the same period in 2021. Despite the strong growth arrival remain at just 39% of the 2019 half-year arrivals.

Forward bookings for the next 3 months show a 229% increase compared to bookings in the same period in 2021, Canada leads growth in the North America region. The bookings for the next 6 months however slow to 204%. Bookings among Canadians are evenly split between direct bookings with airlines and bookings facilitated by the retail trade.

BOOKINGS OUTLOOK

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WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
Canada	1982

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
Canada	2,085	207.5%	5,306	229.0%	9,021	203.6%

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CANADA

CONTEXT

Travelers arriving in Canada are required to be fully vaccinated, while not fully vaccinated travelers, regardless of citizenship, are subject to a COVID-19 test on arrival. Random COVID-19 testing at all airports was paused on June 11, 2022, for fully vaccinated travelers, allowing airports to streamline their operations during this first month of the busy summer travel season.

In June 2022, 464,100 overseas residents arrived in Canada, representing a sharp jump from the 34,500 such arrivals in June 2021. This now represents more than one-half (52.2%) of the overseas residents who arrived in Canada in June 2019, before the pandemic. However, visitors from Europe—jumping from 10,100 in June 2021 to 244,700 in June 2022—appear to be recovering faster than those from Asia, increasing from 12,300 to 99,000 over the same period.

<https://www150.statcan.gc.ca/n1/daily-quotidien/220823/dq220823a-eng.htm?indid=3635-7&indgeo=0>

TRAVEL ADVISORIES

The government of Canada recommends that travelers who have not completed a COVID-19 vaccine series should continue to avoid non-essential travel to all destinations.

Fully vaccinated travelers will no longer need to provide a pre-entry Covid-19 test result to enter Canada by air, land, or water. Fully vaccinated travelers seeking to arrive in Canada before April 1, 2022, must still have a valid pre-entry test.

Travel advisory level: Exercise a high degree of caution in South Africa due to the significant level of serious crime. A Canadian citizen, a permanent resident of Canada, not showing symptoms consistent with Covid-19 may enter Canada. Final determination regarding entry and quarantine is made by a government representative at the port of entry based on the information presented to them at the time of entry into Canada.

<https://travel.gc.ca/destinations/south-africa>

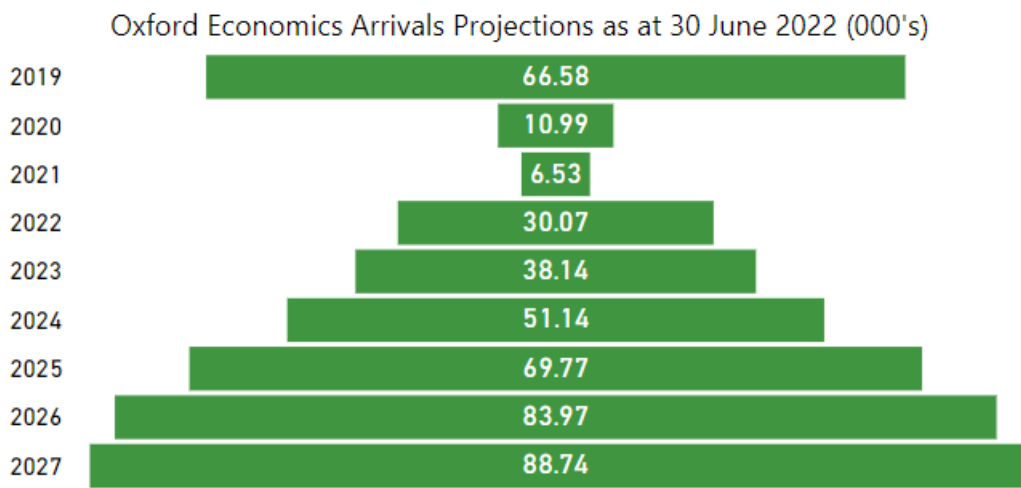
VACCINES

As of the 9th of September 2022, approximately 87% of the Canadian population has received at least one dose of the vaccine and 83% of the Canadian population has been fully vaccinated. As of 7th September 2022, there were no new Covid-19 cases recorded in Canada.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/amro/country/us>



OUTLOOK



Arrivals from Canada are expected to recover to 2019 levels in 2025. The 2022 arrival expectations are for 30 070 tourist arrivals, up 27% from 2021. The projections are significantly behind the actual growth in the first quarter of 2022.

After dropping 6.6 points in July, the Index of Consumer Confidence inched up 2.3 points in August to 75.1 (2014 = 100), breaking a three-month decline. Canada’s economic expansion showed signs of moderating in May and June, pulling back from a strong start to the year in the face of high inflation and rising interest rates. That follows three months of better growth between February and April that helped fuel a robust expansion in the second quarter, which the agency estimated at about 4.6% annualized. Economists anticipate Canada’s growth rate will slow to below 2% annualized in the second half of this year and into 2023.

The Bank of Canada has raised its benchmark policy rate by more than two percentage points since March to slow four-decade high inflation and is expected to raise it at least another half-point on Sept. 8. However, the Bank of Canada delivered a fourth consecutive outsized interest-rate hike in a bid to slow the nation’s economy and drag the inflation down from four-decade highs. Policymakers led by Governor Tiff Macklem raised the benchmark overnight rate by 75 basis points to 3.25% on Wednesday, giving Canada’s central bank the highest policy rate among major advanced economies.

<https://www.bloomberg.com/news/articles/2022-07-29/canada-economy-moderates-from-strong-4-6-second-quarter>
<https://www.conferenceboard.ca/>
<https://www.bloomberg.com/news/articles/2022-09-07/bank-of-canada-hikes-by-75-basis-points>

WHAT NEEDS TO HAPPEN – SHORT TERM (2022)

Direct airlift is needed to see recovery from this market as Covid-19 makes travel more complicated for travelers and connecting flights to some destinations that require multiple tests makes travel prohibitively expensive.

A potential route to a market study slated for Q4 should budget allow for understanding the consumer and trade environment post covid and to understand the insights among the younger demographic segments (Gen Z) and up and up-and-coming Gen A.



KEY MEASURE PERFORMANCE



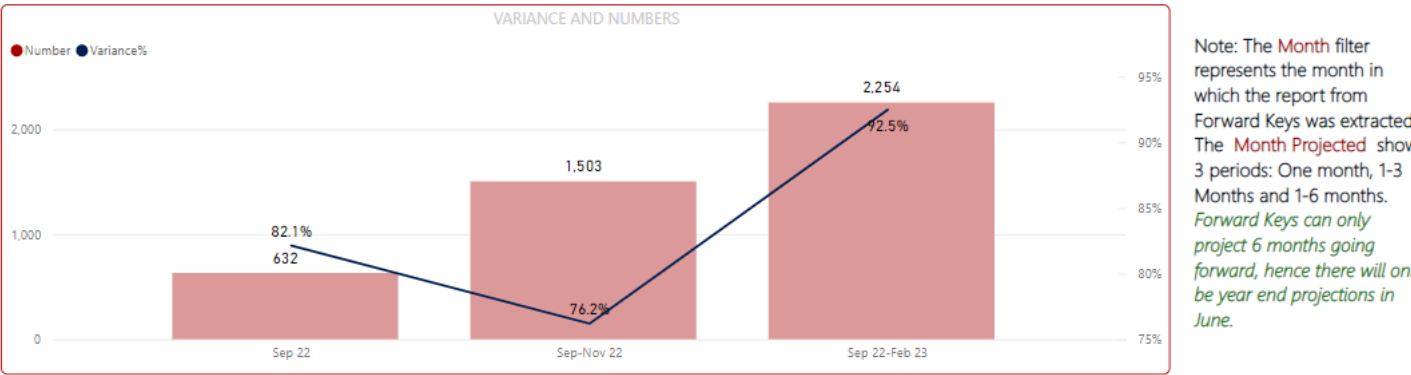
Year MonthName	2021				2022			
	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %
January	234		-97.3%	-97.3%	584		149.6%	149.6%
February	180		-97.4%	-97.3%	689		282.8%	207.5%
March	293		-91.4%	-96.3%	939		220.5%	212.9%
April	318		-100.0%	-94.6%	1,096		244.7%	222.7%
May	303		-100.0%	-93.0%	1,278		321.8%	245.3%
June	358		-100.0%	-91.1%	1,102		207.8%	237.4%
July	278		-100.0%	-89.6%			-100.0%	189.6%
August	423		-100.0%	-87.3%			-100.0%	138.3%
September	536		-100.0%	-84.5%			-100.0%	94.6%
October	971		1665.5%	-79.4%			-100.0%	46.1%
November	952		543.2%	-74.6%			-100.0%	17.4%
December	520		63.0%	-72.3%			-100.0%	6.0%
Total	5,366		-72.3%	-72.3%	5,688		6.0%	6.0%

2022 has seen very strong growth of 245.3% over the same period in the previous year, despite the growth, however, the arrivals remain at just 16% of 2019 levels. May 2022 saw 1 278 arrivals up 321.8% from 2021.

Forward bookings for the next 3 months show a 76% increase compared to bookings in the same period in 2021, Brazil leads growth in the South American region. Brazil has no direct flight at the moment. Most of the travel is through the Middle East with more than half of the travel either on Qatar Airlines or Emirates. Pre-pandemic Brazil had 159 450 seats in 2019 on LATAM

BOOKINGS OUTLOOK

Note: The **Month** filter represents the month in which the report from Forward Keys was pulled. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months.



WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals		Month projected		Sep 22		Sep-Nov 22		Sep 22-Feb 23	
	Number	Variance%	Number	Variance%	Number	Variance%	Number	Variance%	Number	Variance%
Brazil	798				632	82.1%	1,503	76.2%	2,254	92.5%

Disclaimer: The SIA unit makes every effort to publish reports that are error-free. However with the large number of complex records that are analysed, we cannot guarantee that all reports are totally free of errors. All errors that are detected are immediately corrected.



BRAZIL

CONTEXT

51% of Brazilian consumers consider accessibility key for traveling, such as direct flights, and 49% of the Brazilian market consider affordability as an influencing factor when deciding where to go on holiday, far below the global average of 58%. Indicative of this and further defying conventional travel trends, Brazil's outbound destination mix was dominated by Europe. The continent accounted for 68.2% of international departures from Brazil in 2021, followed by North America (28.3%) and South and Central America (3.3%).

Hannah Free, Travel and Tourism Analyst at GlobalData, comments: "A GlobalData Survey* revealed that 60% of Brazilian respondents reported recommendations by friends and family being an influencing factor in destination choice, this was the most influential factor and far exceeded the global average of 47%. Savvy industry players will harness the power of personal recommendations to help build a repeat customer base and create a community of powerful advocates around their product, service or destination. Overall, there is significant scope for international shopping destinations to attract the Brazilian source market, due to high taxes levied on imported luxury goods and the Brazilian market's willingness to dedicate a significant portion of income on outbound travel."

<https://www.hospitalitynet.org/news/>

TRAVEL ADVISORIES

VACCINE CERTIFICATE: Presentation to the airline responsible for the flight, before boarding, of proof of complete vaccination, printed or electronically, with immunization agents approved by the Brazilian Health Regulatory Agency (ANVISA), the World Health Organization, or by the authorities of the country where the traveler was immunized, whose application of the last dose or single dose has occurred at least fourteen days before the date of departure. Booster doses are not required.

EXCEPTIONAL CASES

a) Proof of vaccination may be waived to the following travelers. In those cases, a negative Covid-19 test result will be required:

- (1) Brazilian nationals;
- (2) foreigners' holders of a valid Brazilian residency permit;
- (3) nationals (adults and minors) from countries with low vaccination coverage*;
- (4) minors from 12 to 18 years traveling unaccompanied;
- (5) travelers considered ineligible for vaccination, in accordance with criteria established by the Ministry of Health in the National Plan for Operationalization of Vaccination against COVID-19, available on the following link:

<https://www.gov.br/saude/pt-br/coronavirus/vacinas/plano-nacional-de-operacionalizacao-da-vacina-contr-a-covid-19>.

b) The following travelers are required to present neither proof of vaccination nor a negative Covid-19 test result:

- (1) minors under 2 years;
- (2) minors from 2 to 12 years traveling with an adult.

http://pretoria.itamaraty.gov.br/en-us/coronavirus_-_restrictions_on_traveling_to_brazil.xml

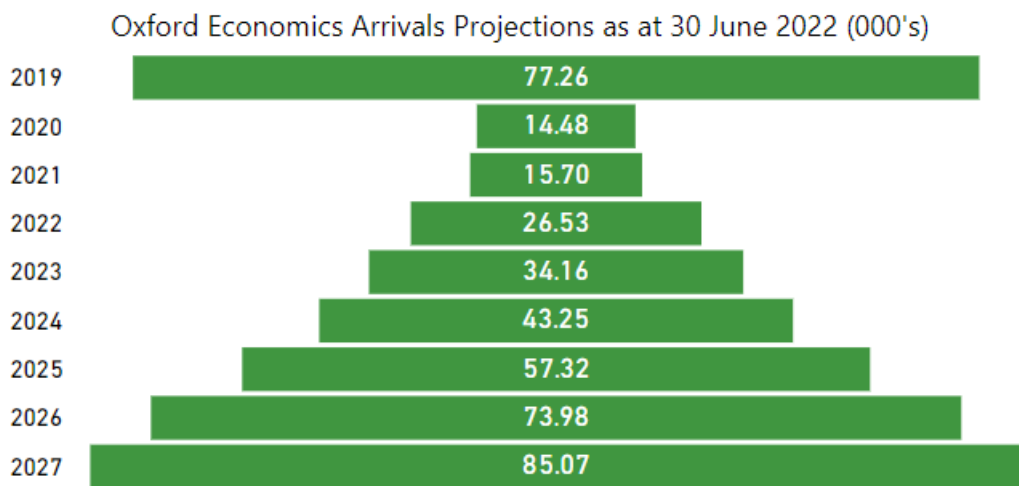
VACCINES

As of the 9th of September 2022, approximately 87% of the Brazilian population has received at least one dose of the vaccine and 80% of Brazil's population has been fully vaccinated. As of 7th September 2022, there were no new COVID-19 cases recorded in Brazil.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/amro/country/us>



OUTLOOK



Arrivals from Brazil are expected to recover to 2019 levels in 2026. The 2022 arrival expectations are for 26 530 tourist arrivals, up 84% from 2021. The projections are behind the actual growth in the first quarter of 2022.

Brazil remains with no direct flights to South Africa.

Brazil's economy picked up more than expected in the second quarter, as a boost in consumer spending offered a tailwind for President Jair Bolsonaro's re-election campaign. The country's gross domestic product (GDP) expanded 1.2% in the three months to June, official statistics agency IBGE said, above the 0.9% growth forecast of economists in a Reuters poll. It was the fourth straight quarter of sequential growth, lifting economic activity 3% above its pre-pandemic level and prompting several banks to raise their 2022 growth forecasts.

An improving economy has revived the election hopes of Bolsonaro, who trails former President Luiz Inácio Lula da Silva in opinion polls but has lifted his popularity with an expanded welfare program and short-term tax measures to curb inflation.

<https://www.reuters.com/world/americas/brazils-gdp-tops-expectations>

WHAT NEEDS TO HAPPEN – SHORT TERM (2022)

Portuguese localized Live Again campaign has been rolled out. Partnership with United Airlines and several trade JMA’s are the priority in this quarter. In August there was a Women in Tourism showcase of female-owned tourism products. Key consumer hosting for Joy of Jazz in November 2022 along with trade familiarization trips to re-educate trade partners on the destination.



AUSTRALIA

KEY MEASURE PERFORMANCE



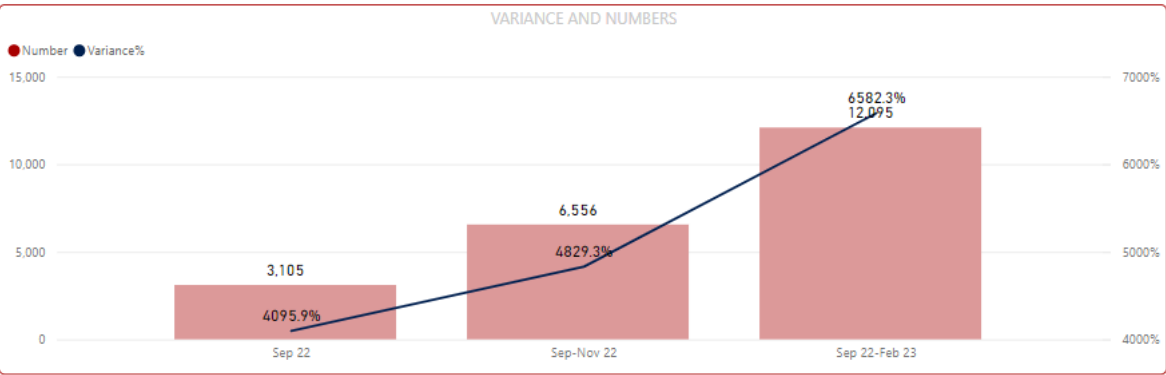
Year MonthName	2021				2022			
	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %
January	180		-97.8%	-97.8%	1,459		710.6%	710.6%
February	142		-98.0%	-97.9%	1,814		1177.5%	916.5%
March	206		-95.4%	-97.3%	3,020		1366.0%	1091.9%
April	255		-100.0%	-96.1%	4,369		1613.3%	1261.7%
May	243		-100.0%	-94.8%	3,741		1439.5%	1303.8%
June	242		-100.0%	-93.6%	3,791		1466.5%	1334.9%
July	210		-100.0%	-92.5%			-100.0%	1131.0%
August	213		-100.0%	-91.5%			-100.0%	975.9%
September	305		-100.0%	-89.9%			-100.0%	811.5%
October	484		204.4%	-87.6%			-100.0%	633.6%
November	880		271.3%	-83.4%			-100.0%	441.5%
December	699		43.8%	-80.4%			-100.0%	348.2%
Total	4,059		-80.4%	-80.4%	18,194		348.2%	348.2%

Australia saw a 1 334.9% growth in arrivals year to date. Australia leads growth in 2022 thus far, the country is the fastest growing market in the first half of 2022. The very strong growth is partly due to a low base, as restrictions prevented travel in 2021.

The forward bookings growth is much higher than the growth in arrivals with 4 829% for the next 3 months. Bookings growth then ramps up towards the next 6 months including the peak in the December holiday season. Seat Capacity is 8 850% higher than in 2021. Fares from Australia are 21% higher in 2022 than in 2021 and 28% higher than the prices in 2019 (pre-pandemic) yet despite this, the pent-up demand continues to increase unabated.

BOOKINGS OUTLOOK

Note: The **Month** filter represents the month in which the report from Forward Keys was pulled. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months.



Note: The **Month** filter represents the month in which the report from Forward Keys was extracted. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months. *Forward Keys can only project 6 months going forward, hence there will only be year end projections in June.*

WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals	Month projected		Sep 22		Sep-Nov 22		Sep 22-Feb 23	
		Country		Number	Variance%	Number	Variance%	Number	Variance%
Australia	2489	Australia		3,105	4095.9%	6,556	4829.3%	12,095	6582.3%



AUSTRALIA

CONTEXT

A total of 390,890 short-term trips were recorded, an increase of 340,390 compared with the corresponding month of the previous year. The number of trips for June 2022 was 53.6% lower than the pre-COVID level in June 2019. New Zealand was the most popular destination country, accounting for 14% of all resident returns. Indonesia and the USA are the second and third most visited destinations by Australians. For June 2022, the highest number of resident returns from short-term trips were observed for New South Wales (142,000), whilst the Northern Territory recorded the fewest (1,760). The most popular reason for travel was 'visiting friends/relatives' (48.2%). The median duration of trips away was 19 days.

<https://www.abs.gov.au/statistics/industry/tourism-and-transport/overseas-arrivals-and-departures-australia>

TRAVEL ADVISORIES

From 6 July 2022, unvaccinated Australian citizens and permanent residents can leave and enter Australia without an individual travel exemption. Travelers entering or leaving Australia do not require a negative pre-departure test and cruise vessels can enter Australian territory. Unvaccinated visa holders will no longer need a travel exemption to enter Australia.

We've reviewed our advice for South Africa. We haven't changed the level of our advice, exercise a high degree of caution. You're no longer required to show proof that you're fully vaccinated against COVID-19 or present a Negative PCR test to enter South Africa.

Exercise a high degree of caution in South Africa due to the high level of serious crime. Pay close attention to your personal security and your current health situation. Monitor the media for new and existing risks. Avoid areas where protests are taking place. Don't attempt to cross protester roadblocks. Shelter in place if caught in a violent situation. Monitor local and social media for updates. Don't take photos or video footage.

<https://www.smartraveller.gov.au/destinations/africa/south-africa>
<https://www.australia.gov.au/international-travel>

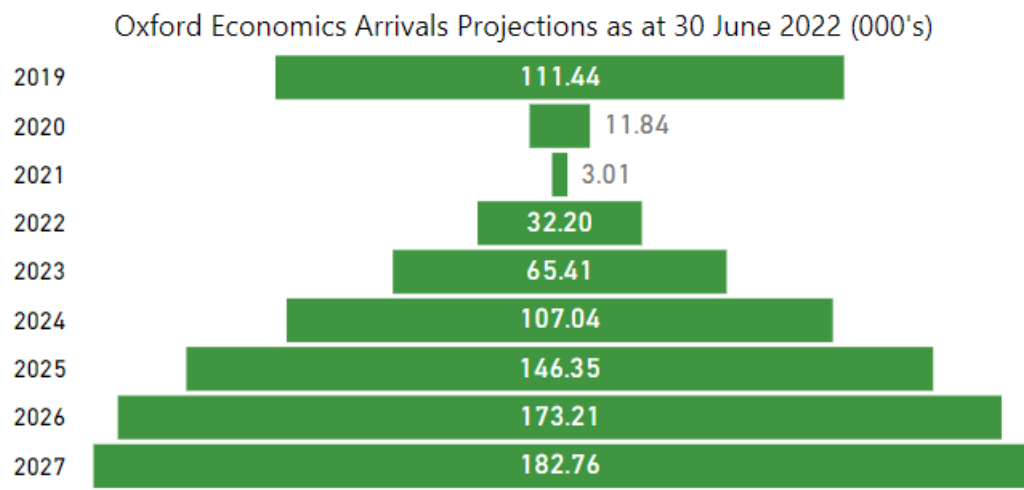
VACCINES

As of the 7th of September 2022, approximately 87% of the Australian population has received at least one dose of the vaccine and 84% of Australia's population has been fully vaccinated. As of 9th September 2022, there were 9 251 new COVID-19 cases recorded in Australia.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/amro/country/us>



OUTLOOK



Arrivals from Australia are expected to recover to 2019 levels in 2024. The 2022 arrival expectations are for 32 200 tourist arrivals, up 1075% from 2021. The projections are in line with the actual growth in the first quarter of 2022.

The Board is committed to returning inflation to the 2–3 per cent range over time. It is seeking to do this while keeping the economy on an even keel. The path to achieving this balance is a narrow one and clouded in uncertainty, not least because of global developments. The outlook for global economic growth has deteriorated due to pressures on real incomes from high inflation, the tightening of monetary policy in most countries, Russia's invasion of Ukraine, and the COVID containment measures and other policy challenges in China.

Inflation in Australia is the highest it has been since the early 1990s and is expected to increase further over the months ahead. Global factors explain much of the increase in inflation, but domestic factors are also playing a role. There are widespread upward pressures on prices from strong demand, a tight labour market and capacity constraints in some sectors of the economy.

<https://www.rba.gov.au/media-releases/2022/mr-22-28.html>

WHAT NEEDS TO HAPPEN – SHORT TERM (2022)

Continue with Phase 3 of the Beat Your Bucket List campaign “Deals” the conversion component which followed the initial awareness and consideration phases that ran the previous fiscal. The localization of Live Again will bring SA to life for the Australian market via witnessing others – by virtue of media, influencers, and content integration - living the experience and demonstrating it is safe to embrace travel to SA again. Monday 18 July marked Mandela Day and to commemorate the occasion, South African Tourism invited 30 trade partners and media to donate their time and cook meals for those less fortunate at OzHarvest in Sydney.

CHINA

KEY MEASURE PERFORMANCE



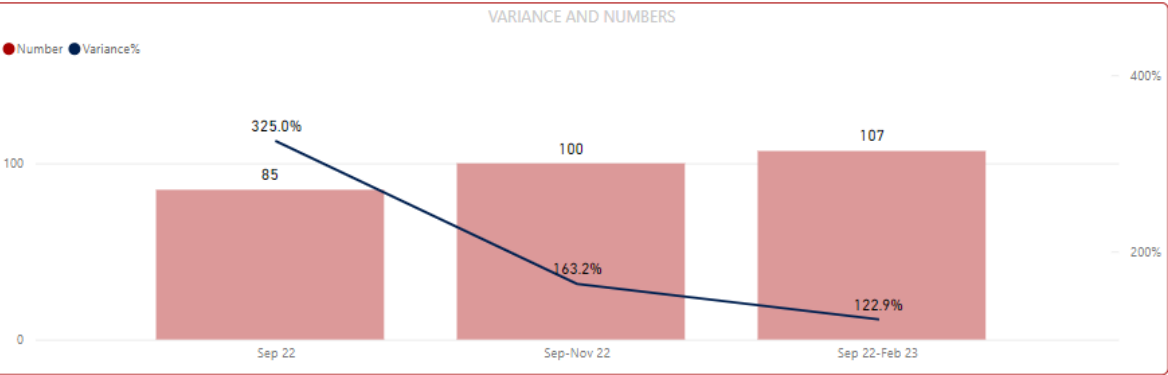
Year MonthName	2021				2022			
	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %
January	317		-96.4%	-96.4%	410		29.3%	29.3%
February	335		-83.4%	-94.0%	632		88.7%	59.8%
March	736		1.2%	-88.0%	795		8.0%	32.3%
April	649		-100.0%	-82.4%	889		37.0%	33.8%
May	747		-100.0%	-75.9%	910		21.8%	30.6%
June	895		-100.0%	-68.2%	813		-9.2%	20.9%
July	297		-100.0%	-65.6%			-100.0%	11.9%
August	411		-100.0%	-62.1%			-100.0%	1.4%
September	544		-100.0%	-57.3%			-100.0%	-9.8%
October	663		167.3%	-52.6%			-100.0%	-20.5%
November	668		88.7%	-48.5%			-100.0%	-29.0%
December	317		-33.3%	-47.9%			-100.0%	-32.4%
Total	6,579		-47.9%	-47.9%	4,449		-32.4%	-32.4%

Arrivals from China have not recovered in 2022 due to the maintenance of a zero-Covid policy. Border restrictions remain in place for outbound travel. June saw -9.2% fewer arrivals compared to 2021. Arrivals for the first half of 2022 are 21% above the last year and represent just 10% of the arrivals pre-pandemic.

Despite the easing of regulations on quarantine and the rumors of borders opening up towards the end of 2022 or in early 2023, the bookings over the next 6 months do not reflect a positive upswing. Bookings for the next three months are 163% up over 2021. The published airline schedules indicate the return of Cathay Pacific in November and December which will avail 4 times the number of seats available from mainland of China. Cathay Pacific will add 9 900 seats from Hong Kong in both months – however, this has not had a similar effect of a surge in bookings. This market is conservative and the formal announcement from the CCP can fairly be anticipated to be the initiating driver of a shift in demand.

BOOKINGS OUTLOOK

Note: The **Month** filter represents the month in which the report from Forward Keys was pulled. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months.



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WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
China + Hong Kong	162
Korea	

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
China + Hong Kong	85	325.0%	100	163.2%	107	122.9%



CHINA

CONTEXT

China shall no longer require COVID test information for international arrivals from August 31, 2022. On Thursday, August 25, 2022, the General Administration of Customs released a new health declaration form for international arrivals, which removes the requirement for visitors to report their nucleic acid test results, their infection status, and vaccination dates. This ninth version of the health declaration form will be implemented starting from August 31, 2022. However, considering that China is still sticking to its dynamic zero-COVID strategy, it is recommended that international travelers double-check with their flight companies for further information.

From 12 August 2022, non-Hong Kong residents and Hong Kong residents are allowed to enter Hong Kong from overseas. The relevant persons are required to comply with all inbound testing and quarantine requirements, including:

- being fully vaccinated and holding a recognized vaccination record
- undergoing a pre-departure nucleic acid test within 48 hours with a negative result (except for children under 3 years old)
- booking a 3-night designated quarantine hotel stay
- completing the Health & Quarantine Information Declaration in advance of boarding
- Passengers transferring or transiting in Hong Kong are not required to present proof of a pre-departure nucleic acid test

<https://www.discoverhongkong.com/eng/latest-travel-advisories.html>
<https://www.china-briefing.com/news/china-travel-restrictions-2021-2022-an-explainer-updated/>

TRAVEL ADVISORIES

In consideration of the epidemic situation in South Africa and the Covid-19 variants, in order to effectively restrain the cross-border transmission of the epidemic and ensure smooth and orderly people-to-people exchanges between South Africa and China, a Closed-Loop Management is required for all the China-bound Passengers before boarding. The detailed procedures are as follows:

Step I. Self-Isolation - All passengers are required to start a self-isolation two weeks before boarding.

Step II. First "Double tests" - All passengers are required to take an IgM antibody & a nucleic acid test

Step III. Closed-loop Management - Only the passengers who have tested negative are able to check in to quarantine facilities (Peermont Metcourt Hotel and Emperors Palace in Johannesburg) are required to be under the 5-day and 4-night "closed-loop" management till the day of departure

Step IV. Second "Double tests" - A second "Double tests" will be conducted on site at the Peermont Metcourt Hotel a day before boarding

Step V. Application - Foreign passengers are required to log in the application program by visiting <https://hrhk.cs.mfa.gov.cn/H5/> or scan the Application QR code

<http://za.china-embassy.org/eng/sggg/t1895690.htm>

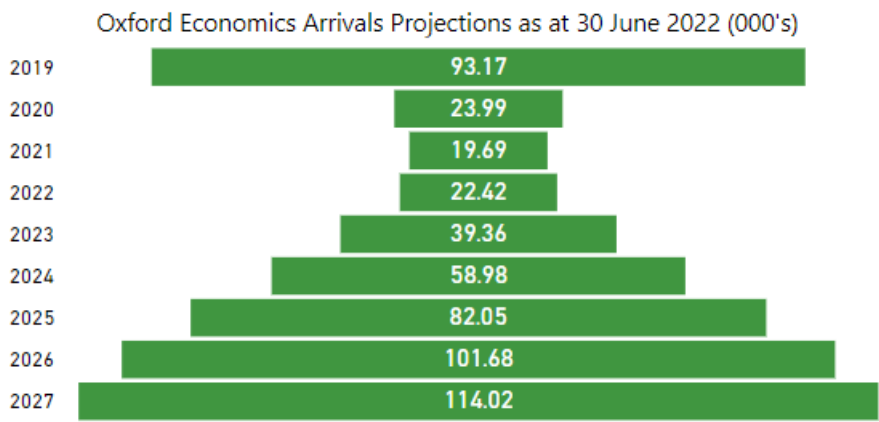
VACCINES

As of the 9th of September 2022, approximately 91% of the Chinese population has received at least one dose of the vaccine and 89% of the population has been fully vaccinated. On 7th September 2022, there were 39 674 new Covid-19 cases recorded in China.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/amro/country/us>



OUTLOOK



Arrivals from China are expected to recover to 2019 levels in 2026. The 2022 arrival expectations are for 22 420 tourist arrivals, up 14% from 2021 these projections are revised down as borders remain closed following the Omicron variants. These projections are in line with the actual growth in the first quarter of 2022.

China’s Growth Prospects Weaken as Economists Cut 2023 Forecasts. Economists are turning more bearish about China’s economy, downgrading their growth forecasts further for 2022 and seeing lingering risks into next year as turmoil in the property market and Covid outbreaks persist. The economy is now projected to grow just 3.5% this year, down from a previous forecast of 3.9%, according to Bloomberg’s latest quarterly survey of economists. Growth projections for the first three quarters of next year were also lowered - by 0.1%-0.4%.

China's nominal GDP reached \$17.5 trillion in 2021, a growth rate of 8.1%. Analysts expect a slower GDP growth rate in 2022 due to very tight Covid measures in the second quarter of this year. The GDP forecast for China is 3.6% for 2022. An upward revision of this GDP forecast is likely if retail sales rebound strongly after the relaxation of the Covid quarantine duration. China is becoming more willing to accept single-digit Covid cases and is reopening schools and restaurants. The government announced the decision to shorten the isolation period for positive Covid cases and adjust the frequency of Covid tests according to the risk of infection, which is a more flexible policy than back in early June 2022. However, the risk of lockdowns still exists, even though the probability is lower than in early June as the government has adopted weekly covid tests in many cities.

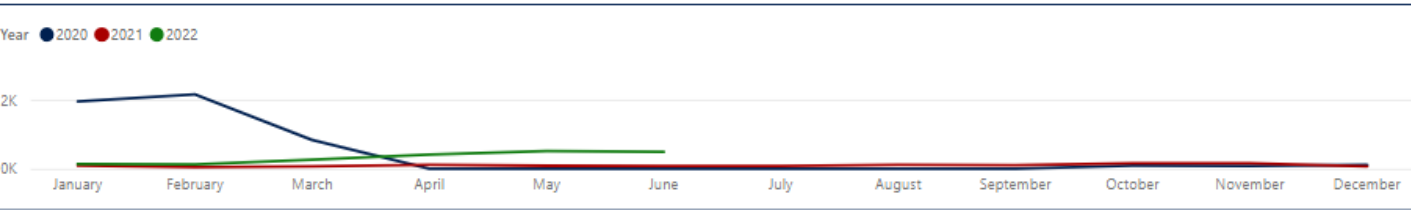
<https://think.ing.com/articles/china-economic-outlook-for-the-second-half-of-2022>
<https://www.bloomberg.com/china-s-growth-prospects-weaken-as-economists-cut-2023-forecasts>

WHAT NEEDS TO HAPPEN – SHORT TERM (2022)

The borders from China remain closed and as such, no tourism activity is permitted. It has been communicated that there is no intention to open the market for tourism in 2022 with Macau the exception to this rule. Consumer activity to generate demand is on hold however agencies have been procured and plans are being put in place to augment always-on online presence. Aviation supply is another priority in the market with Air China being the only active airline and there is a need to replace the SAA route to mainland China should SAA not resume operations or source an alternative airline. Cathay Pacific has also not returned on their Hong Kong routes.



KEY MEASURE PERFORMANCE



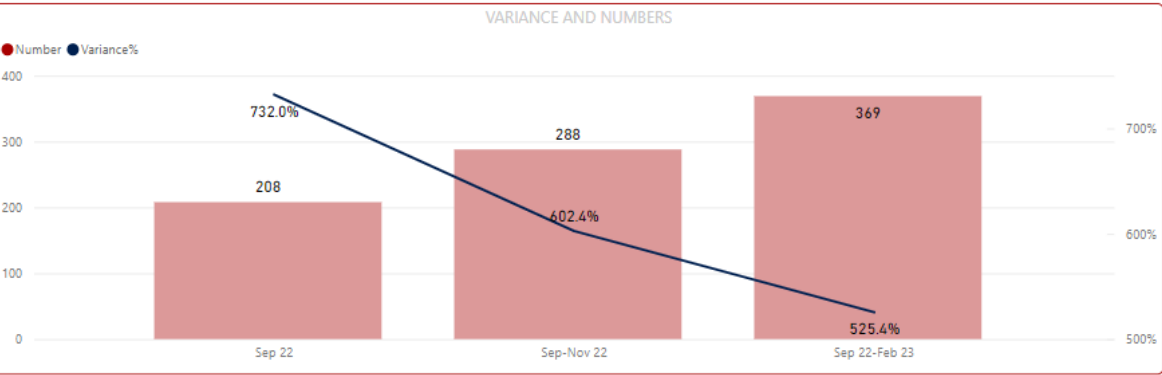
Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	100	-94.9%	-94.9%	144	44.0%	44.0%
February	48	-97.8%	-96.4%	130	170.8%	85.1%
March	67	-92.0%	-95.7%	268	300.0%	152.1%
April	114	-100.0%	-93.3%	413	262.3%	190.3%
May	89	-100.0%	-91.5%	516	479.8%	251.9%
June	79	-100.0%	-89.9%	490	520.3%	294.6%
July	84	-100.0%	-88.2%		-100.0%	237.5%
August	114	-100.0%	-85.9%		-100.0%	182.2%
September	102	-100.0%	-83.9%		-100.0%	146.0%
October	166	80.4%	-80.9%		-100.0%	103.6%
November	159	84.9%	-78.1%		-100.0%	74.8%
December	72	-36.8%	-77.2%		-100.0%	64.2%
Total	1,194	-77.2%	-77.2%	1,961	64.2%	64.2%

Japanese arrivals grew 294.6% in the first half of 2022 over 2021 levels. The May growth of 479.8% and June growth of 520.3% over the last year. This trend speaks to the Japanese having re-opened travel. The 1 961 arrivals thus far, are just 14% of the 2019 levels.

The bookings outlook has seen growth slow from 732% in the month of September to 602% for the next 3 months, and bookings up 525% for the next 6 months. September is the peak as this is the traditional biggest month for Japanese tourist arrivals. Japan has no direct airlift and half of the travel is through Qatar and Dubai hubs in the Middle East.

BOOKINGS OUTLOOK

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Note: The **Month** filter represents the month in which the report from Forward Keys was extracted. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months. *Forward Keys can only project 6 months going forward, hence there will only be year end projections in June.*

WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
Japan	237

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
Japan	208	732.0%	288	602.4%	369	525.4%

Japan to Allow Non-Guided Group Tours From September. Japan will allow non-guided package tours from all countries from Sept. 7 and more than double the number of people it permits to enter daily as it further rolls back some of the strictest Covid-19 border controls among major economies. The moves announced Wednesday by Prime Minister Fumio Kishida, however, do not allow for entry of individual tourists. The premier also didn't lay out any changes for visa restrictions that place a high bar for entering the country.

the country remains closed to independent travelers and continues to unilaterally suspend its visa-waiver agreements, which means that all travelers to Japan need to apply for a visa in advance. It remains unknown when independent travelers will be able to enter the country again and when Japan will restore its visa-waiver program. To visit Japan as a tourist, travelers must purchase a package tour that is organized by a Japan-based travel agency. The travel agency is in charge of arranging international flights, accommodation in Japan and the so-called ERFS certificate, which is required for the visa application.

<https://www.japan-guide.com/news/alerts.html>
<https://www.bloomberg.com/japan-to-allow-non-guided-tourism-and-raise-daily-entry-caps>

TRAVEL ADVISORIES

From 0:00 am (JST) on July 28, 2022, based on the New Border Measures (30), for all cross-border travelers and returnees from countries/regions where the B.1.1.529 Omicron variant becomes dominant (all countries/regions except for those where COVID-19 variants other than the Omicron variant become dominant) which is designated in the New Border Measures (28) (dated May 20, 2022), the length of period when they are required to self-quarantine in places such as their own residence or accommodation after their entry into Japan, to follow-up health checks conducted by the Health Monitoring Center for Overseas Entrants (HCO) and to refrain from using public transportation (hereinafter referred to as "home quarantine") is shortened from 7 days to 5 days. South Africa is among the Blue list countries.

Classification	Vaccination certificate	On-arrival test	Quarantine and other measure after entry in Japan
RED	No	Required	3-day quarantine at a specific facility designated by the chief of the quarantine station (negative test result (PCR test) at the facility)
	Yes	Required	
YELLOW	No	Required	3-day home quarantine + negative result of a voluntary test or 7-day home quarantine without test
	Yes	Not Required	
BLUE	No	Not Required	Home quarantine and other measures are not required
	Yes	Not Required	

https://www.mofa.go.jp/ca/fna/page4e_001053.html#title4
https://www.mofa.go.jp/ca/fna/page4e_001053.html

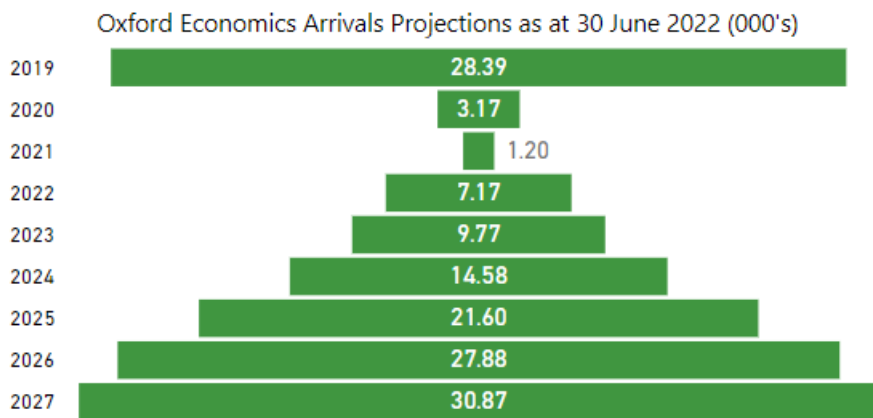
VACCINES

As of the 9th of September 2022, approximately 84% of the Japanese population has received at least one dose of the vaccine and 82% of the population has been fully vaccinated. As of 7th September 2022, there were 100 729 new COVID-19 cases recorded in Japan.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/amro/country/us>



OUTLOOK



Arrivals from Japan are expected to recover to 2019 levels in 2026. The 2022 arrival expectations are for 7 170 tourist arrivals, up over 600% from 2021. The projections are well ahead of the actual growth in the first quarter of 2022.

Japan remains with no direct flights to South Africa.

Japan’s economy grew at an annual rate of 2.2% in the April-June quarter, the government said Monday, as consumer spending rebounded with the gradual lifting of pandemic precautions. After keeping its borders closed to most travelers throughout the pandemic, Japan has slowly begun reopening to tourism, as meanwhile business has returned more or less to normal after various voluntary restrictions were eased.

That means families are venturing out and spending more, even as coronavirus infection rates have soared with the spread of the omicron variant of COVID-19. A revised estimate put growth for the world’s third-largest economy as flat in the first quarter of the year, upgraded from an earlier reading of a 0.5% contraction. The reading for the last quarter was below forecasts for 2.5% annual growth. In quarterly terms, the economy expanded 0.5%, surpassing its pre-pandemic size but slightly weaker than analysts had expected. “Nevertheless, it suggests that pent-up demand from COVID-19 reopening could continue to underpin growth ahead,” Jun Rong Yeap of IG said in a commentary.

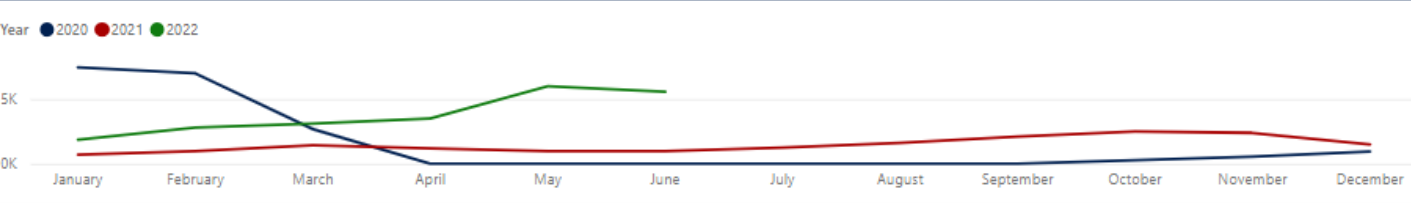
<https://apnews.com/article/covid-health-japan-economy>

WHAT NEEDS TO HAPPEN – SHORT TERM (2022)

Tour packages through approved agents are currently permitted however tourism is not fully reopened. The media buy strategy is being developed and will be finalized in Q1 so that execution can commence. PR agencies are being appointed. Trade engagements continue with 61 trade partners joining the SA live webinar on 28 July 2022. Plans are underway for JATA Expo with stand build and decorations cost.

The online roadshow has been planned for Q4. However, since last month Japan opened its borders to South Africa, hence the teams will be considering a physical roadshow during the current fiscal.

KEY MEASURE PERFORMANCE



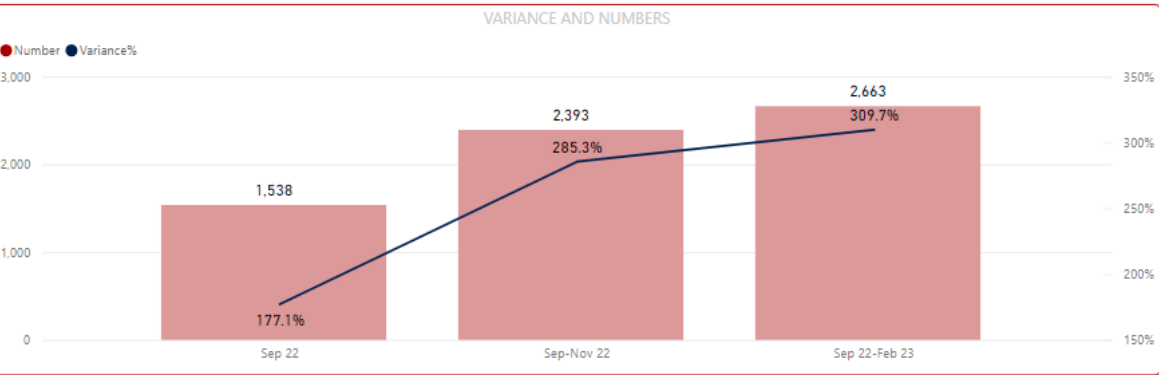
Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	710	-90.5%	-90.5%	1,863	162.4%	162.4%
February	983	-85.9%	-88.3%	2,790	183.8%	174.8%
March	1,428	-46.6%	-81.8%	3,108	117.6%	148.7%
April	1,201	-100.0%	-74.7%	3,513	192.5%	160.9%
May	986	-100.0%	-69.0%	5,993	507.8%	225.3%
June	979	-100.0%	-63.3%	5,568	468.7%	263.2%
July	1,241	-100.0%	-56.0%		-100.0%	203.3%
August	1,613	-100.0%	-46.6%		-100.0%	149.8%
September	2,118	-100.0%	-34.2%		-100.0%	102.8%
October	2,511	757.0%	-20.9%		-100.0%	65.8%
November	2,392	337.3%	-10.0%		-100.0%	41.3%
December	1,500	59.7%	-6.5%		-100.0%	29.3%
Total	17,662	-6.5%	-6.5%	22,835	29.3%	29.3%

Arrivals from India in the first half of 2022 reached 22 835, up 263.2% over 2021. This represents 44% of 2019 levels. June saw 5 568 arrivals grew over 468.7% last year.

Forward booking for the next 3 months from India grew over 285% from 2021, and the growth is despite travelers needing to connect due to the lack of direct flights to South Africa. Bookings growth peaks in November 2022, as the bookings for the next 6 months increased to 310% over the same period in the previous year. In this 3-month period over 96% of Indian bookings to South Africa are on Emirates, Kenyan Airways, and Ethiopian aircraft.

BOOKINGS OUTLOOK

Note: The **Month** filter represents the month in which the report from Forward Keys was pulled. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months.



Note: The **Month** filter represents the month in which the report from Forward Keys was extracted. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months. *Forward Keys can only project 6 months going forward, hence there will only be year end projections in June.*

WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
India	2693

Month projected	Sep 22		Sep-Nov 22		Sep 22-Feb 23	
Country	Number	Variance%	Number	Variance%	Number	Variance%
India	1,538	177.1%	2,393	285.3%	2,663	309.7%

Disclaimer: The SIA unit makes every effort to publish reports that are error-free. However with the large number of complex records that are analysed, we cannot guarantee that all reports are totally free of errors. All errors that are detected are immediately corrected.



CONTEXT

India leads Asia-Pacific in its intent to travel in the second half of 2022 with 50 percent of Indians expressing the desire to spend more money on booking a vacation, reveals the world's largest survey of travel intentions from Travel Lifestyle Network (TLN) in a post-pandemic setting. While international travel still remains a point of contention among many, with only 15% of respondents willing to travel abroad and 29% planning for a vacation in India.

Jaipur-based restaurateur Dushyant Singh is just back from a solo trip to Italy, Denmark, Norway, and Germany. In May, Ritvik Kalita, a Guwahati-based businessman, was watching the Grand Prix in Monte Carlo, Monaco, with his buddies. Delhi-based publicist Sugandh Swani has been showcasing her recent family vacation to Turkey on social media. Every time you scroll your social media timeline, more likely than not you will see a friend or relative posting travel updates from some exotic destination.

Yes, revenge travel is up like never before. VFS Global, a visa processing provider, claims that visa applications in the country "are averaging more than 20,000 per day as we head into the July–August holiday season".

<https://english.mathrubhumi.com/features/travel/india-emerges-as-a-global-leader-in-travel-in-2022-1.7756470>
<https://timesofindia.indiatimes.com/india/how-indians-are-driving-global-travel-like-never-before>

TRAVEL ADVISORIES

India has removed all testing on arrival and quarantine requirements for vaccinated travelers (from certain countries) flying to India. Unvaccinated travelers still need to provide proof of a valid negative PCR test taken within 72 hours of arrival. Thus, Indians can freely travel and return without having to go through the tedious process of pre-travel testing and isolation measures.

June 8, India's aviation regulator DGCA announced fresh guidelines for COVID-appropriate behavior. The wearing of masks is now mandatory inside the flight / throughout the air travel, and mask removal is permitted only under exceptional circumstances. Violators could be treated as 'unruly passengers' and removed from the flight before departure. This is in line with a Delhi High Court order, which stipulates that violators can be put on 'no-fly list'.

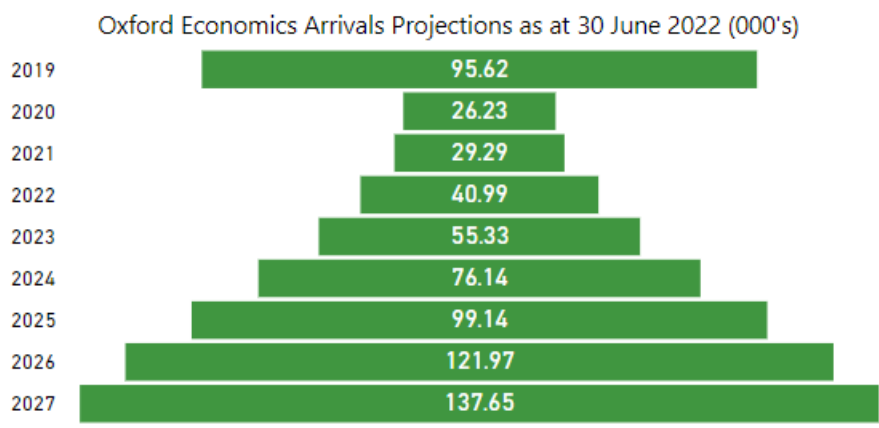
<https://www.india-briefing.com/news/india-international-travel-latest-rules-20683.html/>
<https://travelbans.org/en/asia/india>

VACCINES

As of the 9th of September 2022, approximately 73% of the Indian population has received at least one dose of the vaccine and 67% of the population has been fully vaccinated. As of 7th September 2022, there were 5 379 new COVID-19 cases were recorded in India and India continues to have the 2nd highest number of COVID-19 cases globally.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/amro/country/us>

OUTLOOK



Arrivals from India are expected to recover to 2019 levels in 2025. The 2022 arrival expectations are for 40 990 tourist arrivals, up 40% from 2021. The projections are well behind the actual growth in the first quarter.

India remains with no direct flights to South Africa.

The monthly PCSI is measured by four weighted sub-indices. And in August, we see a mixed bag. While the confidence is up for personal finances and investments and savings, the sentiment has dipped for confidence around the economy and jobs. The PCSI Employment Confidence (“Jobs”) Sub-Index is down 0.9 percentage points; the PCSI Economic Expectations (“Expectations”) Sub-Index, is down 0.3 points. While PCSI Current Personal Financial Conditions (“Current Conditions”) Sub-Index is up 0.1 percentage points and the Investment Climate (“Investment”) Sub-Index is up 0.6 percentage points; over the previous month.

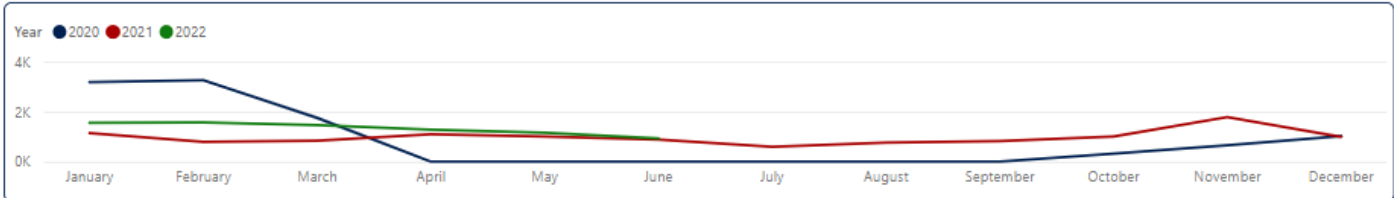
Elucidating on the findings of the monthly survey, which is akin to the industry bell weather on consumer confidence, Amit Adarkar, CEO, of Ipsos India said, “Prima facie, the survey shows a minor weakening of the consumer sentiment. But when we look deeper at the four sub-indices employed to measure consumer sentiment, it shows consumers are satisfied with their finances for running of day-to-day households. And they also are confident about their savings for the future and for the purchase of big-ticket items. This bodes well for the domestic economy and consumption. On the flip side, there is worry looming around the global impact on the Indian economy and the slowdown and its long-term impact on the cost of living. There is also fear around jobs, whether around job retention or new job creation. With the Ukraine war far from over and the pandemic impact yet to wear off, the sentiment is likely to yo-yo or remain unpredictable, until the macro factors improve.”

<https://www.ipsos.com/en-in/consumer-sentiment-weakens-august-2022>

WHAT NEEDS TO HAPPEN – SHORT TERM (2022)

In collaboration with Air Seychelles, we will be running a DDC campaign where the exclusive rate offered by the airline will be highlighted in the creative to trigger consumers to book a ticket to South Africa. The exclusive rate offered by the airline for this campaign is INR 39,000/- There will be an additional 7-10% discount over and above the rate offered which will be applicable on the Air Seychelles website.

KEY MEASURE PERFORMANCE



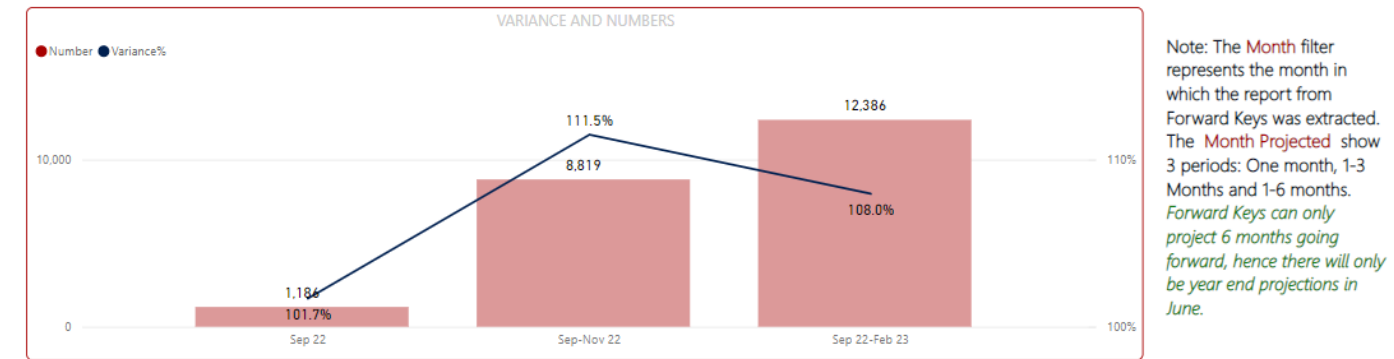
Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	1,147	-63.9%	-63.9%	1,548	35.0%	35.0%
February	798	-75.5%	-69.8%	1,568	96.5%	60.2%
March	840	-52.0%	-66.0%	1,456	73.3%	64.2%
April	1,092	-100.0%	-52.6%	1,276	16.8%	50.8%
May	1,009	-100.0%	-40.3%	1,164	15.4%	43.5%
June	890	-100.0%	-29.4%	926	4.0%	37.4%
July	592	-100.0%	-22.2%		-100.0%	24.7%
August	758	-100.0%	-12.9%		-100.0%	11.4%
September	825	-100.0%	-2.8%		-100.0%	-0.2%
October	1,012	206.7%	5.3%		-100.0%	-11.4%
November	1,774	171.7%	17.1%		-100.0%	-26.1%
December	998	-2.6%	15.2%		-100.0%	-32.4%
Total	11,735	15.2%	15.2%	7,938	-32.4%	-32.4%

In June 2022 there were 926 arrivals from Nigeria which is 4,0% higher than arrivals in the same period in 2021. Arrivals from Nigeria have been on a steady rise since October 2021, despite the dip in December 2020 (due to the Omicron variant and travel restrictions) and the dip in June 2022 (which is the winter season in South Africa). According to Forward Keys, there were 1186 actual bookings to South Africa for August 2022.

On average, for Nigerians, the time between booking and visiting South Africa is one month. Nigeria’s bookings for September 2022 increased by 101.7% to 1186 bookings, when compared to the same period in 2021. There is exponential growth in booking to South Africa for the summer season.

BOOKINGS OUTLOOK

Note: The **Month** filter represents the month in which the report from Forward Keys was pulled. The **Month Projected** show 3 periods: One month, 1-3 Months and 1-6 months.



WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals		Month projected		Sep 22		Sep-Nov 22		Sep 22-Feb 23	
			Country		Number	Variance%	Number	Variance%	Number	Variance%
Nigeria		1186	Nigeria		1,186	101.7%	8,819	111.5%	12,386	108.0%



NIGERIA

CONTEXT

Nigeria’s annual inflation rate grew significantly for the fourth month to 19.4% in July 2022 from 18,4% in May 2022, which is above market expectations of 17.4%. This has been the steepest inflation rate since June 2021, driven by increases in the prices of food and non-food products. Food inflation surged to 20.6% since May 2022. Like most African countries, Nigeria is grappling with rising prices of food, as the continent is still largely dependent on agricultural imports, especially grains. Also, escalating diesel prices and the ongoing dollar shortage and the weakening Naira contributed to the upward trend in inflation.

<https://tradingeconomics.com/nigeria/inflation-cpi>

TRAVEL ADVISORIES

Nigeria outbound

If travellers are fully vaccinated, prior to departure, all passengers travelling must register and complete the on-line pre-boarding health declaration at the Nigeria International Travel Portal.

Travellers must present two documents at their point of departure. A verifiable proof of vaccination certificate and a permit to travel certificate, which will be obtained after completion of the pre-boarding health declaration.

South Africa inbound

All international travellers arriving at the Ports of Entry who are-

- (i) fully vaccinated must upon arrival at the Port of Entry, produce a valid vaccination certificate; and
- (ii) unvaccinated must upon arrival at the Port of Entry, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.

<https://travelbans.org/africa/nigeria/>

VACCINES

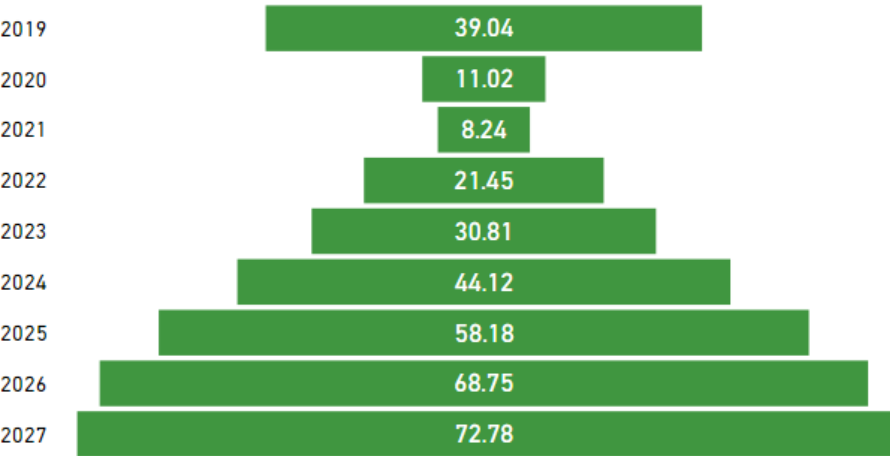
As of the 17th July 2022 approximately 17.1% of the Nigerian population has received at least one dose of the vaccine and 11.6% of the Nigerian population has been fully vaccinated. Presidential Steering Committee on COVID-19 and the Federal Ministry of Health through the NPHCD have come up with the SCALES 3.0 strategy, which is an evidence-based strategy that was developed to curb the slow uptake of the COVID-19 vaccination and uses human-centre demand generation design to address low the COVID-19 vaccination rate.

<https://ourworldindata.org/covid-vaccinations>
<https://edition.cnn.com/2022/01/07/africa/nigeria-working-covid-vaccine-intl/index.html>
<https://www.africanews.com/2022/01/27/nigeria-launches-another-covid-19-vaccination-drive/>

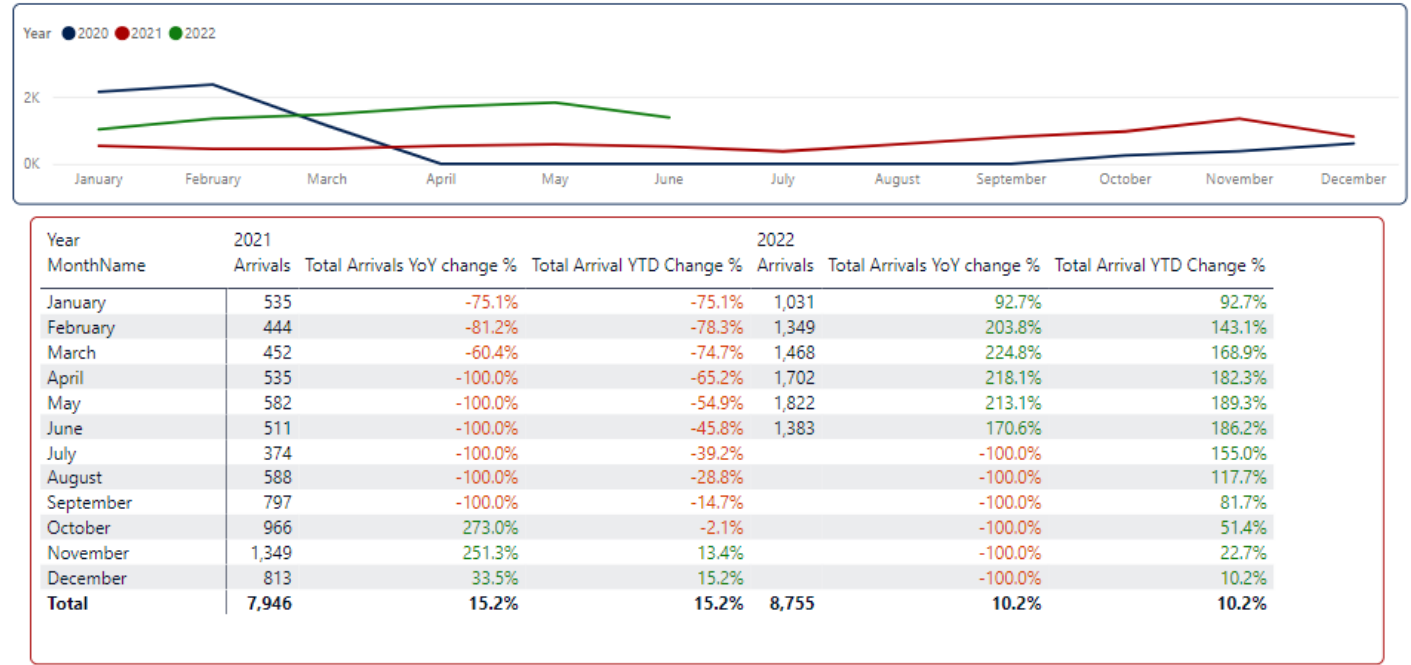


OUTLOOK

Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



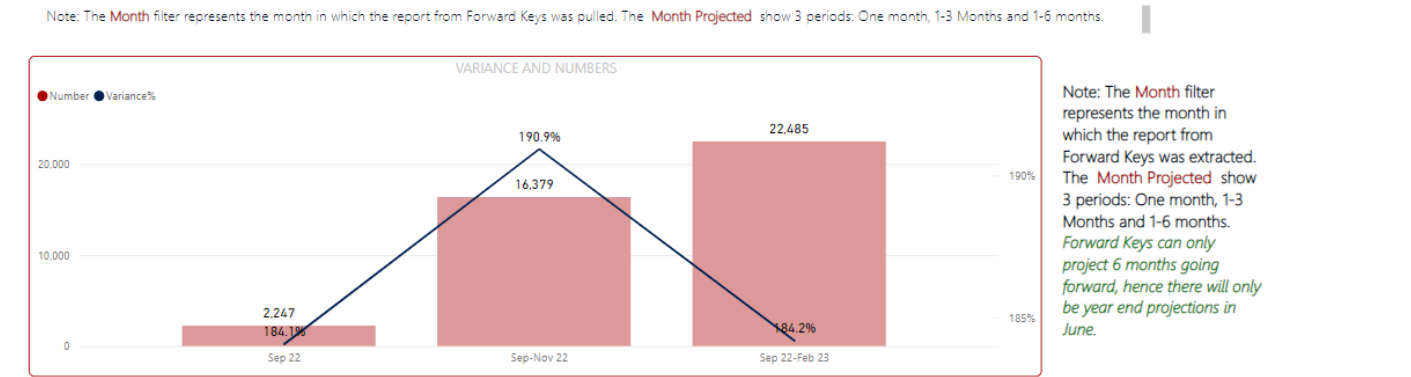
Outbound travel from Nigeria to South Africa is expected to grow by approximately 160% in 2022 compared to 2021. Inbound arrivals from Nigeria are forecasted to be at 2019 levels in 2024.



In June 2022 there were 1 383 arrivals from Kenya which is 170,6% higher than arrivals in June 2021. May 2022 recorded the highest arrivals from Kenya since the beginning of the COVID-19 lockdown and its travel restrictions, surpassing 1 800 tourist arrivals. According to Forward Keys, there were 2 247 actual bookings to South Africa for July 2022. Which is an indication that there is growth in the market.

On average for Kenyans, the time between booking and visiting South Africa is one month. Kenya’s bookings for September 2022 increased by 184.1% to 2 247 bookings, when compared to August 2021. September to November has 16 379 bookings from Kenya, which means there are 14 132 bookings for the months of October and November 2022.

BOOKINGS OUTLOOK



WHAT DID THE PAST MONTHS CLOSE ON - AUGUST 2022

Country	Past Arrivals
Kenya	2247

Month projected	Sep 22	Sep-Nov 22	Sep 22-Feb 23			
Country	Number	Variance%	Number	Variance%	Number	Variance%
Kenya	2,247	184.1%	16,379	190.9%	22,485	184.2%

Disclaimer: The SIA unit makes every effort to publish reports that are error-free. However with the large number of complex records that are analysed, we cannot guarantee that all reports are totally free of errors. All errors that are detected are immediately corrected.



KENYA

CONTEXT

The annual inflation for Kenya grew to a near 5-year high to 8.5% in August of 2022. The number has surpassed the upper limit of the central bank’s target range of 2.5% - 7.5%. It is the heist figure since June 2017. Inflation has been rising since March 2022 because of disruptions caused by the war in Ukraine that resulted in fuel and food prices soaring. Transport prices were up 7.6% and housing and utilities 5.6%.

<https://tradingeconomics.com/kenya/inflation-cpi#:~:text=The%20annual%20inflation%20rate%20in%20Kenya%20accelerated%20to%207.1%25%20in,by%20the%20war%20in%20Ukraine.>

TRAVEL ADVISORIES

Kenya outbound

Vaccinated travellers are not required to take a PCR test before travelling Kenya, the are required to upload their vaccine certificate to the Global Haven website before boarding their flight.

Unvaccinated travellers who meet the criteria for an exemption from presenting proof of vaccination will need to present a negative COVID-19 PCR test certificate, conducted within 72 hours of their departure, to enter or travel through Kenya. They must upload their negative PCR test certificate to the Global Haven website before boarding their flight.

South Africa inbound

All international travellers arriving at the Ports of Entry who are-

- (i) fully vaccinated must upon arrival at the Port of Entry, produce a valid vaccination certificate; and
- (ii) unvaccinated must upon arrival at the Port of Entry, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.

<https://travelbans.org/africa/kenya/>
<https://www.kcaa.or.ke/covid-19/quarantine-exempted-states>
<https://katakenya.org/2021/11/06/Kenya-joins-global-coalition-to-advance-sustainable-tourism/>
<https://www.aa.com.tr/en/africa/dont-close-borders-over-omicron-kenyan-leader-urges-wealthy-nations/2435076>

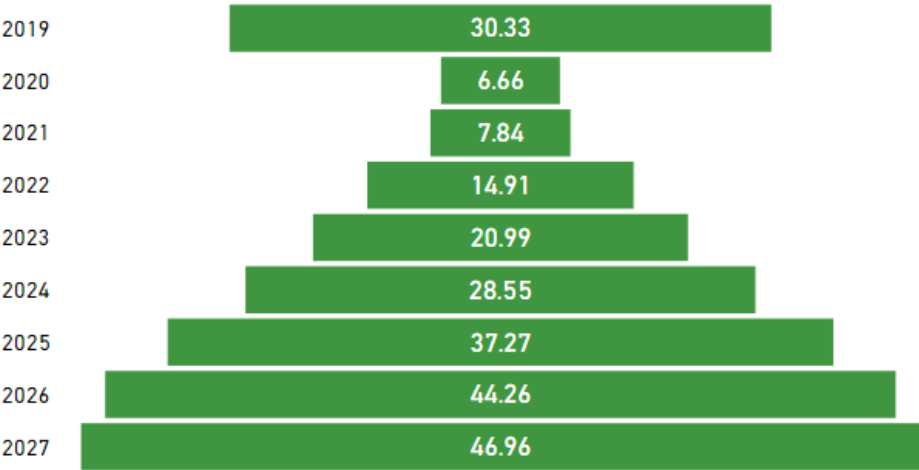
VACCINES

As of the 19th June 2022 approximately 23.9% of the Kenyan population has received at least one dose of the vaccine, 27.6% of the Kenyan population has been fully vaccinated. Kenya has received over 1.36 million Pfizer doses from the United States government. The shipment of the doses was expected to arrive in the early February 2022. Nearly 840,000 vaccines against Covid-19 that were donated have expired in Kenya even before they could be administered to the public. Vaccination has been considerably slow in recent weeks.

<https://ourworldindata.org/covid-vaccinations>
<https://www.enca.com/news/kenya-mauritania-get-nearly-2-million-us-covid-vaccine-doses>



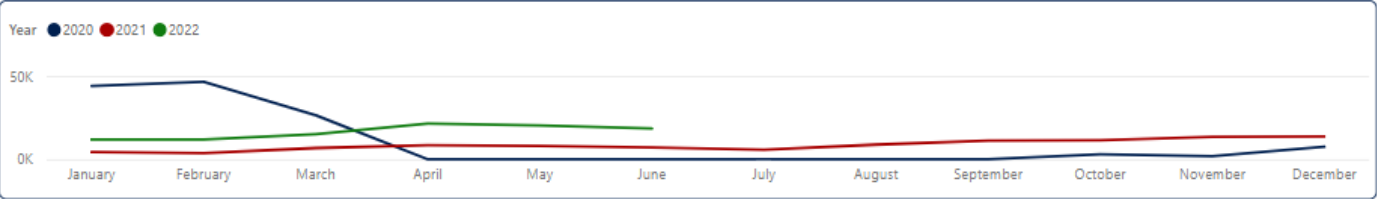
Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Outbound travel from Kenya to South Africa is expected to grow by approximately 90% in 2022 compared to 2021. Inbound arrivals from Kenya are forecasted to be at 2019 levels in 2024.



KEY MEASURE PERFORMANCE



Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	4,425	-90.0%	-90.0%	11,834	167.4%	167.4%
February	3,682	-92.1%	-91.1%	11,821	221.0%	191.8%
March	6,784	-74.4%	-87.3%	15,005	121.2%	159.6%
April	8,593	-100.0%	-79.9%	21,554	150.8%	156.4%
May	8,075	-100.0%	-73.0%	20,265	151.0%	155.0%
June	7,207	-100.0%	-66.9%	18,591	158.0%	155.6%
July	5,671	-100.0%	-62.1%		-100.0%	122.9%
August	8,844	-100.0%	-54.5%		-100.0%	85.9%
September	11,214	-100.0%	-44.9%		-100.0%	53.6%
October	11,447	278.5%	-36.8%		-100.0%	30.5%
November	13,434	625.8%	-26.7%		-100.0%	10.8%
December	13,782	83.9%	-20.3%		-100.0%	-4.0%
Total	103,158	-20.3%	-20.3%	99,070	-4.0%	-4.0%

In June 2022 there were 18 591 arrivals from Botswana which is 158% higher than arrivals in the same period in 2021. Arrivals in April and May 2022 surpassed 20 000 arrivals, April 2022 had the highest since the travel restrictions.

TRAVEL ADVISORIES

Botswana outbound

COVID-19 entry and exit requirements may be announced and altered at little notice. Travellers are recommended to visit the government of Botswana’s Facebook page for the latest developments or contact the government of Botswana’s 24 hour COVID-19 helpline on 16649 / 0800 600 111 to get more details about COVID-19 requirements.

South Africa inbound

The 21 land borders which are fully operational will remain as such and the 32 land borders which were closed will remain closed.

Traveling to the Republic of South Africa from neighbouring countries is allowed, subject to subregulation (3): Provided that travellers who are-

- (a) fully vaccinated must upon arrival at the land border, produce, a valid vaccination certificate; and
- (b) unvaccinated must upon arrival at the land border, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.

<https://travelbans.org/africa/botswana/>
<https://www.iol.co.za/travel/africa/botswana-says-travel-bans-over-omicron-a-big-blow-to-its-tourism-sector>

CONTEXT

The annual inflation rate in Botswana climbed to 14.3% in July of 2022, up from 12.7% in June of 2022. It was the highest level since January 2009, amid a weaker pula against the USD and due to soaring prices of transport (35% in June) powered by the recent adjustment in fuel pump prices. Additional upward pressure came from food & non-alcoholic beverages (9.6%); housing & utilities (86.3%) and miscellaneous goods & services (9.2%). On a monthly basis, consumer prices were up 1.3%, following a 2.6% increase in the previous month.

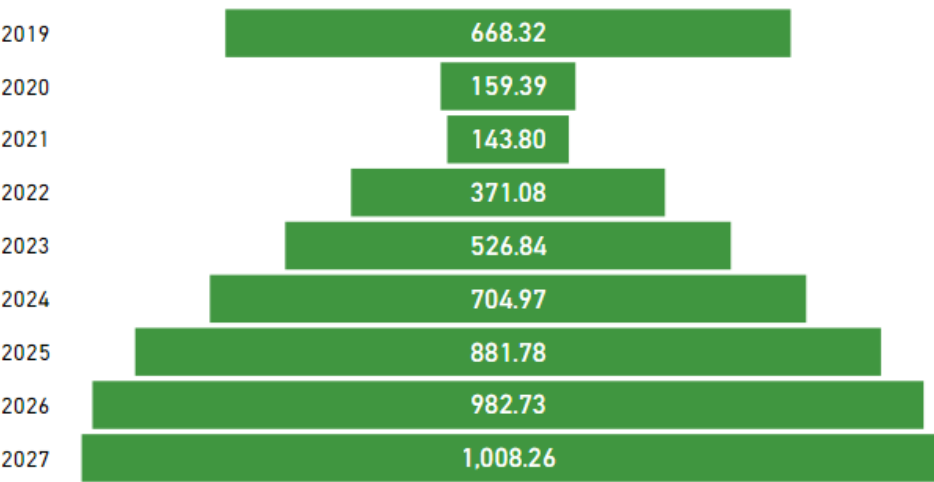
VACCINES

As of the 10th June 2022 approximately 90.6% of Botswana’s population has received at least one dose of the vaccine and 82.8% of Botswana’s population has been fully vaccinated. Approximately to 243,800 individuals have received their booster vaccination doses. At the end of January 2022 Botswana had more than three million Covid-19 vaccines to administer and thus achieving immunity and also provide booster doses.

<https://ourworldindata.org/covid-vaccinations>

OUTLOOK

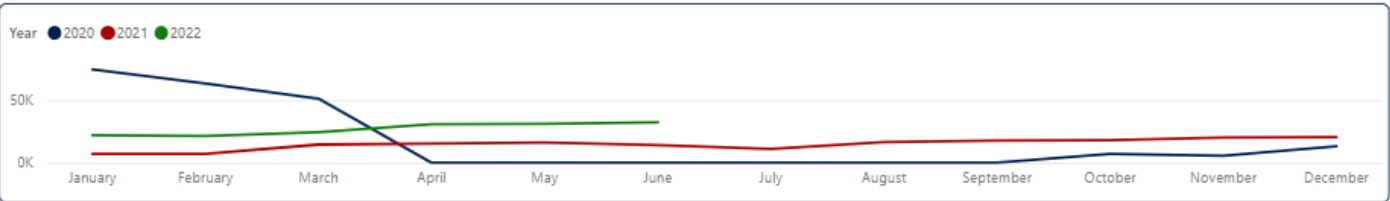
Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Botswana’s arrivals to South Africa is expected to recover to 2019 levels in 2024 a one-year delay from previous forecasts. Arrivals to South Africa are expected to grow by 158% in 2022



KEY MEASURE PERFORMANCE



Year	2021			2022		
MonthName	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	6,951	-90.7%	-90.7%	21,854	214.4%	214.4%
February	7,173	-88.7%	-89.7%	21,231	196.0%	205.0%
March	14,525	-71.6%	-84.8%	24,410	68.1%	135.6%
April	15,290	-100.0%	-76.7%	30,649	100.5%	123.4%
May	16,225	-100.0%	-68.2%	31,201	92.3%	115.0%
June	13,951	-100.0%	-60.8%	32,216	130.9%	118.0%
July	11,107	-100.0%	-54.9%		-100.0%	89.6%
August	16,365	-100.0%	-46.2%		-100.0%	59.0%
September	17,570	-100.0%	-36.9%		-100.0%	35.6%
October	17,951	149.6%	-30.1%		-100.0%	17.8%
November	20,016	260.8%	-22.1%		-100.0%	2.8%
December	20,526	54.8%	-17.4%		-100.0%	-9.1%
Total	177,650	-17.4%	-17.4%	161,561	-9.1%	-9.1%

In June 2022 there were 32 216 arrivals from Eswatini which is 130.9% higher than arrivals in the same period in 2021. On a monthly basis, arrivals showed steady growth in 2021 and continuing into June 2022. With June 2022 recording arrivals the highest since travel restrictions, which shows signs of positive recovery heading into 2022.

TRAVEL ADVISORIES

Eswatini outbound

Upon arrival at the points of entry, travellers exiting the Kingdom of Eswatini must produce either of the following, a valid COVID-19 vaccination certificate if fully vaccinated or a valid negative COVID-19 PCR test result (hard or electronic) that is not older than 72 hours, for the unvaccinated.

Valid vaccination certificates considered are those of COVID-19 vaccine candidates that have been prequalified by WHO. Vaccination cards are not allowed at points of entry – only vaccination certificates allowed.

Outbound travellers from Eswatini must also comply with the requirements of airlines and the country of transit and destination.

South Africa inbound

The 21 land borders which are fully operational will remain as such and the 32 land borders which were closed will remain closed.

Traveling to the Republic of South Africa from neighbouring countries is allowed, subject to subregulation (3): Provided that travellers who are-

- (a) fully vaccinated must upon arrival at the land border, produce, a valid vaccination certificate; and
- (b) unvaccinated must upon arrival at the land border, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.



CONTEXT

Inflation rate in Eswatini increased to 4.6% in June 2022 from 3.9% in May of 2022

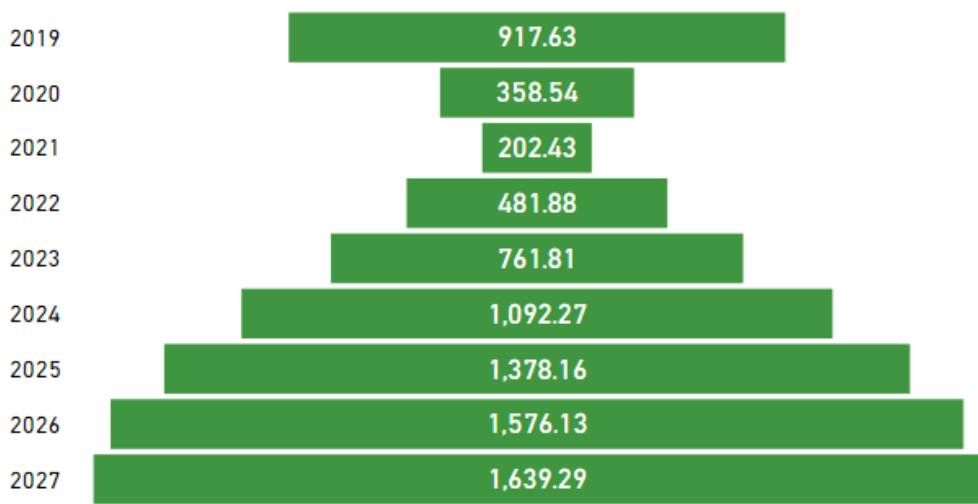
VACCINES

As of the 10th June 2022 approximately 33.5% of Eswatini’s population has received at least one dose of the vaccine and 28.7% of Eswatini’s population has been fully vaccinated.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/afro/country/ng>

OUTLOOK

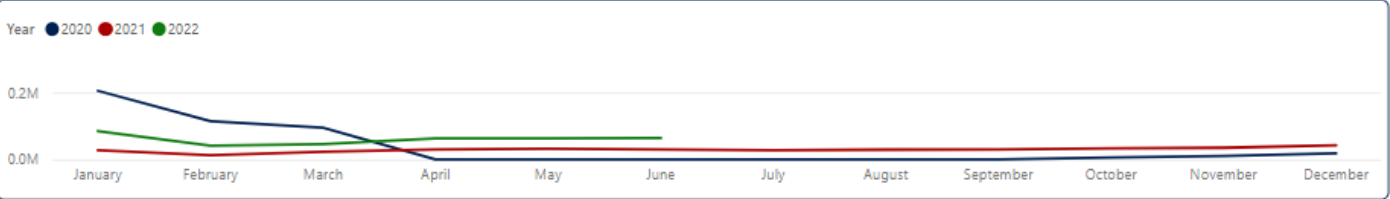
Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Eswatini’s arrivals to South Africa is expected to recover to 2019 levels in 2024, a one-year early from the previous forecasts. Travel from Eswatini is expected grow by 105% in 2022 compared to 2021.



KEY MEASURE PERFORMANCE



Year	2021			2022		
MonthName	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	27,628	-86.5%	-86.5%	84,960	207.5%	207.5%
February	12,488	-89.0%	-87.4%	41,767	234.5%	215.9%
March	23,349	-75.5%	-84.7%	46,233	98.0%	172.5%
April	29,679	-100.0%	-77.5%	63,229	113.0%	153.6%
May	32,702	-100.0%	-69.6%	62,830	92.1%	137.6%
June	30,214	-100.0%	-62.3%	64,545	113.6%	133.0%
July	27,766	-100.0%	-55.6%	-	-100.0%	97.8%
August	29,388	-100.0%	-48.5%	-	-100.0%	70.5%
September	30,316	-100.0%	-41.1%	-	-100.0%	49.3%
October	33,865	436.5%	-34.0%	-	-100.0%	31.1%
November	35,082	246.8%	-27.4%	-	-100.0%	16.3%
December	42,778	130.1%	-20.8%	-	-100.0%	2.3%
Total	355,255	-20.8%	-20.8%	363,564	2.3%	2.3%

In June 2022 there were 64 545 arrivals from Lesotho which is 113.6% higher than arrivals in the same period in 2021. The arrivals from Lesotho have been consistently growing, with the January 2022 arrival recording the highest number of arrivals since the beginning of the COVID-19 pandemic and has doubled since December 2021, with June 2022 arrivals being the second highest.

TRAVEL ADVISORIES

Lesotho outbound

- A negative COVID-19 PCR test taken within 72 hours is required for entry. This should show:
- the name of the traveller (which must correspond with their travel document)
 - a serial number which is not duplicated
 - clear and visible proof that the certificate was issued within 72 hours
 - the date on which the swab was taken and the date the results were provided to the traveller
 - the name of the testing laboratory approved by the Minister responsible for health

Limited passenger air services between Johannesburg and Moshoeshoe International Airport have restarted. The COVID-19 PCR test requirements are the same as for the land borders.

A PCR test is also required to depart from Lesotho and enter South Africa through the land borders.

South Africa inbound

The 21 land borders which are fully operational will remain as such and the 32 land borders which were closed will remain closed.

Traveling to the Republic of South Africa from neighbouring countries is allowed, subject to subregulation (3): Provided that travellers who are-

- (a) fully vaccinated must upon arrival at the land border, produce, a valid vaccination certificate; and
- (b) unvaccinated must upon arrival at the land border, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.



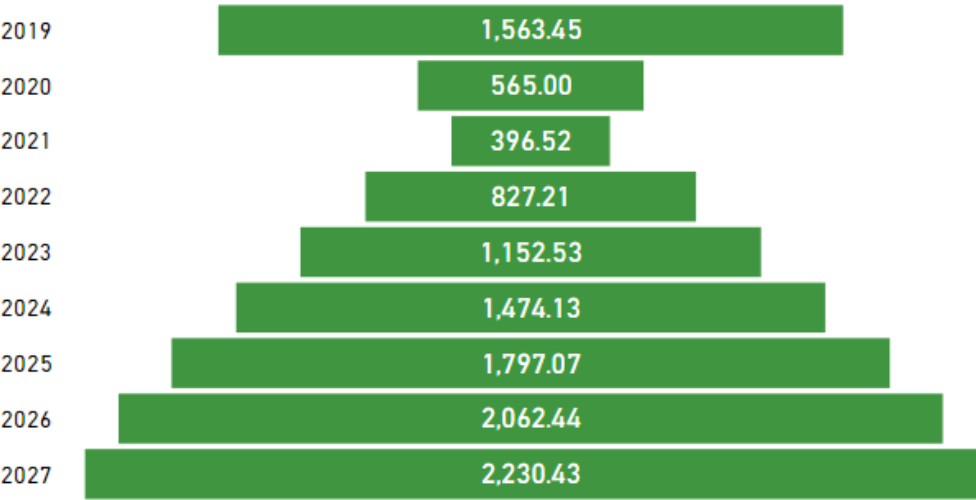
VACCINES

As of the 10th May 2022 approximately 43.3%% of Lesotho’s population has received at least one dose of the vaccine and 34.1% of Lesotho’s population has been fully vaccinated. With effect from 1st January 2022, the government has made it mandatory for its citizens to be vaccinated in order for them to enter their workplaces. Citizens needs to produce a vaccination certificate in order for them to be allowed entry into their workplaces, said the Health Minister Semano Sekatle.

<https://ourworldindata.org/covid-vaccinations>
<https://www.news24.com/fin24/companies/health/lesotho-makes-vaccines-mandatory-to-access-workplaces-services-20211220>

OUTLOOK

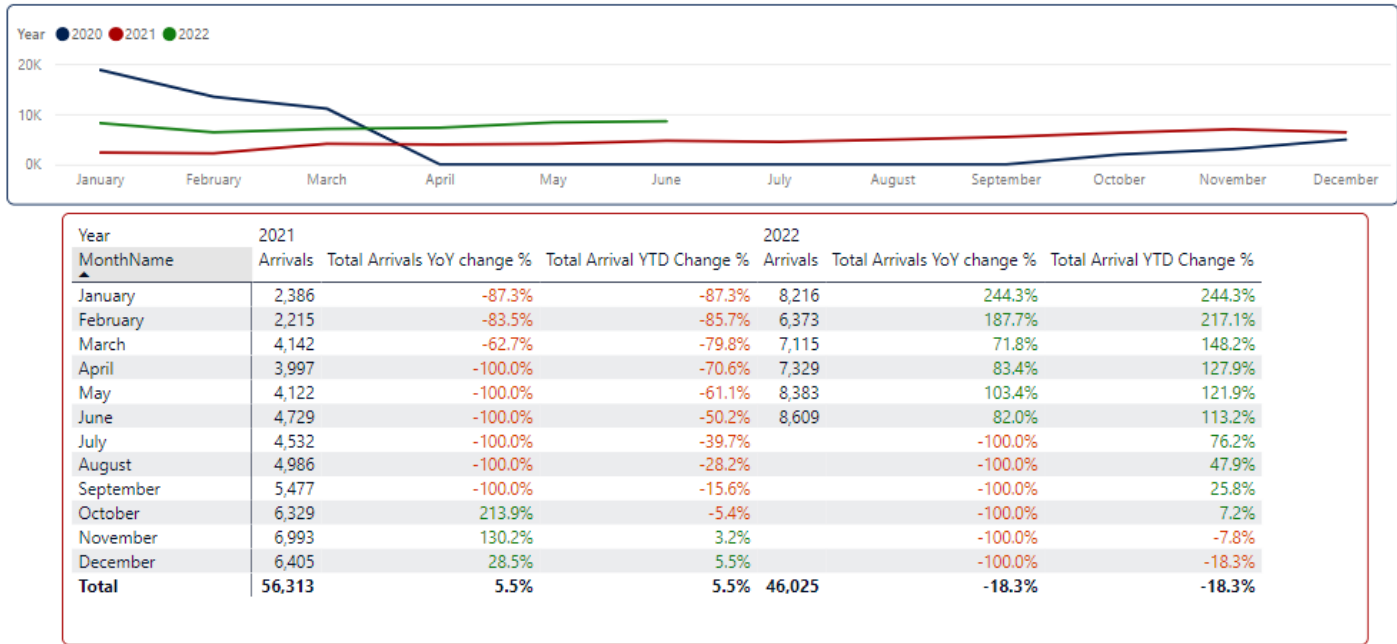
Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Lesotho’s arrivals to South Africa are expected to recover to 2019 levels in 2025. Travel out of Lesotho to South Africa is forecasted to grow in 2022.



KEY MEASURE PERFORMANCE



In June 2022 there were 8 609 tourist arrivals from Malawi which is an 82% growth than arrivals in the same period in 2021. June 2022 recorded the highest number of arrivals from Malawi, since the COVID-19 travel restriction and lockdown. The growth in tourist arrivals is a continuation from the last quarter of 2021.

TRAVEL ADVISORIES

Malawi outbound

Fully vaccinated travellers are now required to show that they are fully vaccinated to enter or exit Malawi. They must present an electronically verifiable full vaccination certificate and proof of a negative COVID-19 PCR test, not older than 72 hours from the time of departure from their country of origin, in order to enter Malawi. Failure to provide these may result in the traveller being refused entry to their flight or being turned away at the border. Travellers are encouraged to visit the Malawi Ministry of Health Facebook page for further information, because COVID-19 entry and exit requirements may be announced and altered at little notice.

South Africa inbound

The 21 land borders which are fully operational will remain as such and the 32 land borders which were closed will remain closed.

Traveling to the Republic of South Africa from neighbouring countries is allowed, subject to subregulation (3): Provided that travellers who are-

- (a) fully vaccinated must upon arrival at the land border, produce, a valid vaccination certificate; and
- (b) unvaccinated must upon arrival at the land border, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.

<https://www.malawitourism.com/travel-advice/>
<https://www.dropbox.com/s/ykyazzrbl49p4lc/20210621%20Trusted%20Travel%20Announcement.pdf?dl=0>
<https://twnews.co.uk/mw-news/malawi-airlines-employees-strike-underway-in-lilongwe>



CONTEXT

The annual inflation rate in Malawi rose further to 24.6% in July of 2022, the highest since December of 2015, from 23.5% in June 2022.

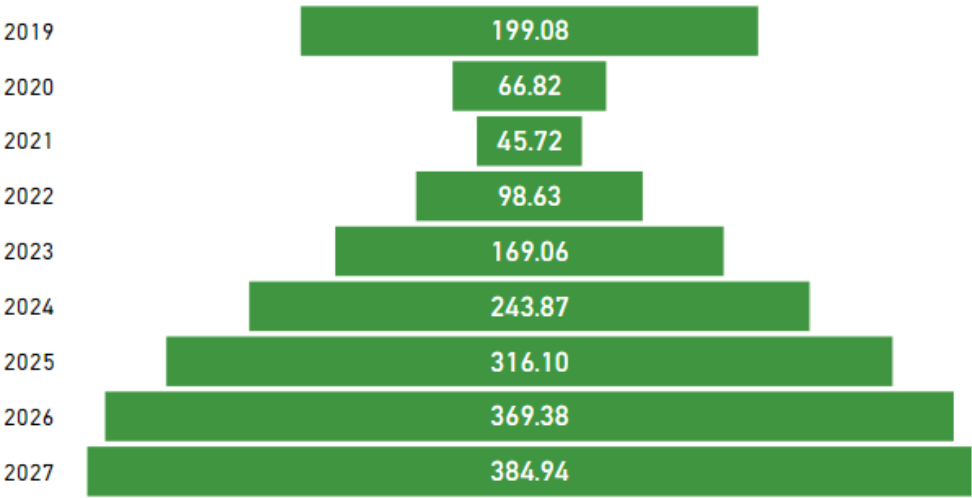
VACCINES

As of the 7th August 2022 approximately 12.4% of Malawi’s population has received at least one dose of the vaccine and 9.7% of Malawi’s population has been fully vaccinated. The COVID-19 response in Malawi has been delayed by corruption and vaccines hesitancy driven mainly by religious beliefs. In February 2022, Malawi declared a Type 1 wild poliovirus outbreak

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/afro/country/ng>
<https://www.afro.who.int/news/malawi-declares-polio-outbreak>

OUTLOOK

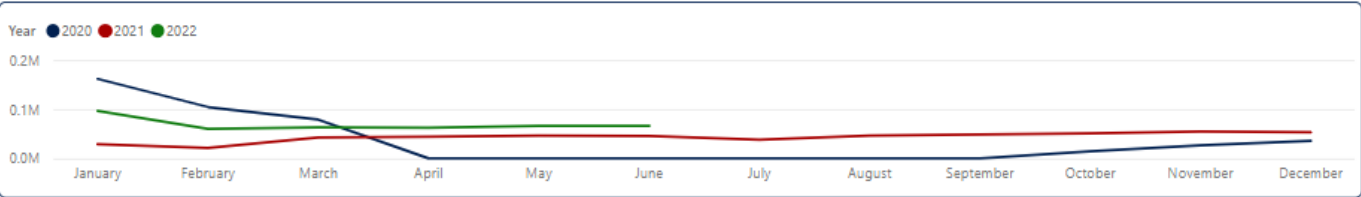
Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Malawi’s arrivals to South Africa are expected to recover to 2019 levels in 2024, a year earlier than predicted. Travel out of Malawi to South Africa is expected to grow by 116% in 2022 compared to 2021.



KEY MEASURE PERFORMANCE



Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	28,771	-82.2%	-82.2%	96,511	235.4%	235.4%
February	21,406	-79.5%	-81.1%	60,393	182.1%	212.7%
March	42,593	-46.0%	-73.1%	62,983	47.9%	137.0%
April	44,521	-100.0%	-60.2%	62,650	40.7%	105.8%
May	46,653	-100.0%	-46.7%	66,391	42.3%	89.7%
June	46,105	-100.0%	-33.3%	66,371	44.0%	80.5%
July	38,171	-100.0%	-22.3%		-100.0%	54.8%
August	46,568	-100.0%	-8.8%		-100.0%	31.9%
September	48,871	-100.0%	5.4%		-100.0%	14.2%
October	51,196	243.2%	15.3%		-100.0%	0.1%
November	54,586	104.2%	21.4%		-100.0%	-11.5%
December	53,425	49.0%	23.7%		-100.0%	-20.6%
Total	522,866	23.7%	23.7%	415,299	-20.6%	-20.6%

Mozambique recorded the third highest tourist arrivals into South Africa in June 2022. There were 66 371 tourist arrivals from Mozambique in June 2022, which is 44.0% higher than arrivals in the same period in 2021. The arrivals from Mozambique have been consistently growing, with the first half of 2022 arrival recording the highest numbers above 60 000 arrivals per month, since the beginning of the COVID-19 pandemic.

TRAVEL ADVISORIES

Mozambique outbound

Testing for COVID 19 may be required on arrival in Mozambique, at their expense. Travelers presenting a negative COVID 19 PCR test are exempt from the quarantine regime. The test must have been issued in the departure country, within 72 hours prior to the time of arrival.

On February 16, 2022, President Filipe Jacinto Nyusi extended the current state of calamity restrictions to mitigate the spread of COVID-19 (Decree 4/2022), while announcing changes to the restrictions. These restrictions apply to all persons residing in Mozambique. The changes in the State of Calamity may change at a short notice, travellers are encouraged to contact their accommodation provider, tour operator or local government authorities for the latest information.

South Africa inbound

The 21 land borders which are fully operational will remain as such and the 32 land borders which were closed will remain closed.

Traveling to the Republic of South Africa from neighbouring countries is allowed, subject to subregulation (3): Provided that travellers who are-

- (a) fully vaccinated must upon arrival at the land border, produce, a valid vaccination certificate; and
- (b) unvaccinated must upon arrival at the land border, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.



CONTEXT

The annual inflation rate in Mozambique accelerated for the fifth consecutive month to 12.1% in August of 2022, from 11.8% in July 2022. It was the highest reading since August of 2017, amid generalized increases in prices of goods and services, led by transport (21.34%) and food & non-alcoholic beverages (17.27%). Additional strong pressure came from prices of restaurants & hotels (8.55%) and housing & utilities (8.57%).

<https://tradingeconomics.com/mozambique/inflation-cpi>

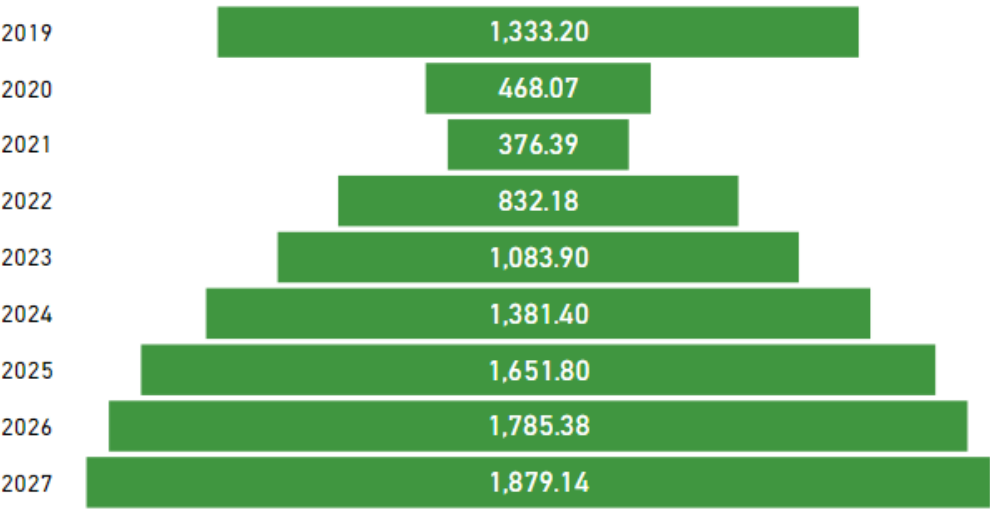
VACCINES

As of the 10th June 2022 approximately 69.0% of Mozambique’s population has received at least one dose of the vaccine and 66.2% of Mozambique’s population has been fully vaccinated. Approximately 304 400 individuals have received a booster dose.

<https://ourworldindata.org/covid-vaccinations>
<https://covid19.who.int/region/afro/country/ng>

OUTLOOK

Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Mozambique’s arrivals to South Africa are expected to recover to 2019 levels in 2024, the recovery forecast has been moved forward by a year. Travel out of Mozambique into South Africa is expected to grow by 90% in 2022 compared to 2021.



KEY MEASURE PERFORMANCE



Year MonthName	2021				2022			
	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals	YoY change %	Total Arrival YTD Change %
January	4,998		-65.6%	-65.6%	8,376		67.6%	67.6%
February	5,585		-55.5%	-60.9%	8,843		58.3%	62.7%
March	7,596		-15.7%	-49.6%	11,279		48.5%	56.8%
April	8,603		-100.0%	-25.8%	11,866		37.9%	50.7%
May	8,489		-100.0%	-2.3%	10,379		22.3%	43.9%
June	6,036		-100.0%	14.4%	10,430		72.8%	48.1%
July	5,421		-100.0%	29.4%			-100.0%	30.9%
August	7,561		-100.0%	50.4%			-100.0%	12.7%
September	7,951		-100.0%	72.4%			-100.0%	-1.7%
October	9,106		52.2%	69.5%			-100.0%	-14.3%
November	9,139		96.0%	72.2%			-100.0%	-24.0%
December	10,986		41.4%	67.8%			-100.0%	-33.1%
Total	91,471		67.8%	67.8%	61,173		-33.1%	-33.1%

In June 2022 there were 10 430 tourist arrivals from Namibia, which is 72.8% more than the levels of June 2021. Arrivals from Namibia have been showing steady growth from the last quarter of 2021 into May 2022 and they have been consistently above 10 000 since March 2022. The highest tourist arrivals number was recorded in April 2022.

TRAVEL ADVISORIES

Namibia outbound

In mid February the Government of Namibia has implemented the following restrictions in response to the pandemic: closure of most land borders for tourism purposes.

South Africa inbound

The 21 land borders which are fully operational will remain as such and the 32 land borders which were closed will remain closed.

Traveling to the Republic of South Africa from neighbouring countries is allowed, subject to subregulation (3): Provided that travellers who are-

- (a) fully vaccinated must upon arrival at the land border, produce, a valid vaccination certificate; and
- (b) unvaccinated must upon arrival at the land border, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.

<https://travelbans.org/africa/namibia/>



CONTEXT

The annual inflation rate in Namibia rose to 6.8% in July 2022 from 6.0% in the previous month, the highest since March of 2017. The increase was mainly due to soaring prices of transport (20.9% percent vs 18.6% in June); food & non-alcoholic beverages (8.4% vs 7%), of which oils & fats (26.5%) and fruit (24.5%) and hotels, cafes & restaurants (9.8% vs 8.6%).

<https://tradingeconomics.com/namibia/inflation-cpi>

VACCINES

As of the 31st July 2022 approximately 22.0% of Namibia’s population has received at least one dose of the vaccine and 19.1% of Namibia’s population has been fully vaccinated. In January 2022, the Namibian government has launched an initiative to encourage and mobilize to get vaccinated to debunk the rumours and myths about the COVID-19 vaccine. Namibia could destroy another 330 000 vaccine doses by October 2022, due to the slow uptake of the COVID-19 vaccine. Namibia has spent more than R300 million on Covid-19 vaccine procurement, to assist the country to reach its target of reaching community immunity which should be 60% of the population.

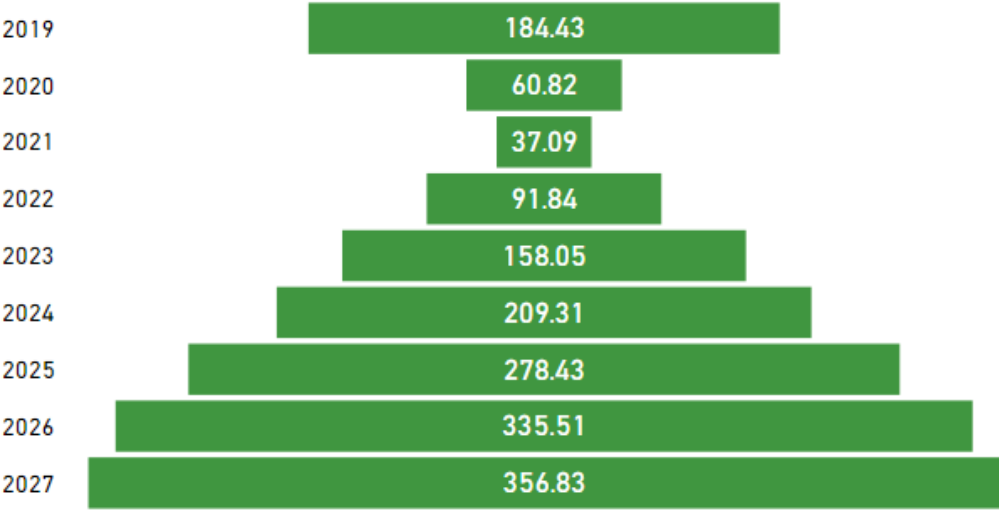
<https://ourworldindata.org/covid-vaccinations>

<https://covid19.who.int/region/afro/country/ng>

<https://www.news24.com/news24/africa/news/namibia-has-spent-r300-million-on-covid-19-vaccine-procurement-20220215>

OUTLOOK

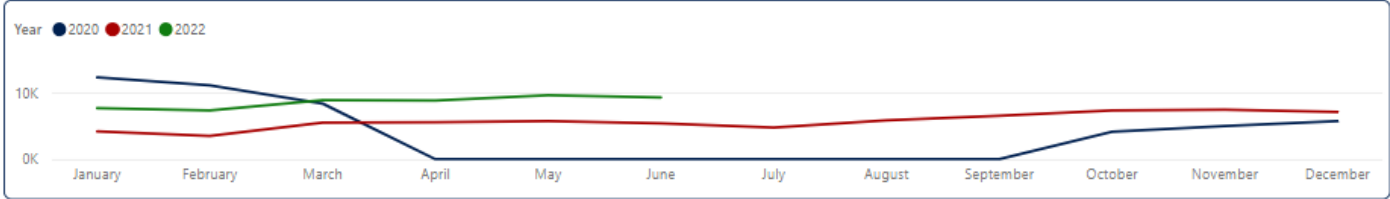
Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Travel to South Africa are forecasted to growth by 119% in 2022. Namibia’s arrivals to South Africa are expected to recover to 2019 levels in 2024.



KEY MEASURE PERFORMANCE



Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	4,167	-66.0%	-66.0%	7,638	83.3%	83.3%
February	3,504	-68.4%	-67.1%	7,315	108.8%	94.9%
March	5,465	-34.3%	-58.5%	8,820	61.4%	81.0%
April	5,530	-100.0%	-41.0%	8,764	58.5%	74.3%
May	5,714	-100.0%	-23.0%	9,574	67.6%	72.7%
June	5,389	-100.0%	-6.0%	9,248	71.6%	72.5%
July	4,769	-100.0%	9.1%		-100.0%	48.7%
August	5,825	-100.0%	27.5%		-100.0%	27.2%
September	6,487	-100.0%	48.0%		-100.0%	9.6%
October	7,309	76.5%	51.3%		-100.0%	-5.2%
November	7,442	49.5%	51.1%		-100.0%	-16.6%
December	7,068	23.8%	47.7%		-100.0%	-25.2%
Total	68,669	47.7%	47.7%	51,359	-25.2%	-25.2%

In June 2022 there were 9 248 tourist arrivals from Zambia which is 71.6% more than June 2021 levels. May 2022 recorded the highest number of arrivals from Zambia and June 2022 the second highest number of arrivals, since the COVID-19 travel restriction and lockdown.

TRAVEL ADVISORIES

Zambia outbound

Travellers to Zambia are encouraged to be fully vaccinated but this is not mandatory. Regardless of vaccination status, travellers are required to complete a health declaration form and undergo thermo-scanning. All travellers are required to adhere to the prescribed COVID-19 public health measures. Some airlines ask passengers for evidence of a negative PCR test taken within 72 hours prior to arrival in Zambia. Travellers are encouraged to check their airline’s guidelines carefully when arranging their tests.

South Africa inbound

The 21 land borders which are fully operational will remain as such and the 32 land borders which were closed will remain closed.

Traveling to the Republic of South Africa from neighbouring countries is allowed, subject to subregulation (3): Provided that travellers who are-

- (a) fully vaccinated must upon arrival at the land border, produce, a valid vaccination certificate; and
- (b) unvaccinated must upon arrival at the land border, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.

<https://travelbans.org/africa/zambia/>



CONTEXT

Zambia's annual inflation rate rose for the first time in nearly one year to 9.9% in July 2022 from 9.7% in the previous month. Prices rose for both food (12% vs 11.9% in June), namely cooking oil; and non-food products (7.2% vs 6.9%). Mainly due to an increase in fuel pump prices which triggered an upward adjustment to public bus fares.

<https://tradingeconomics.com/zambia/inflation-cpi>

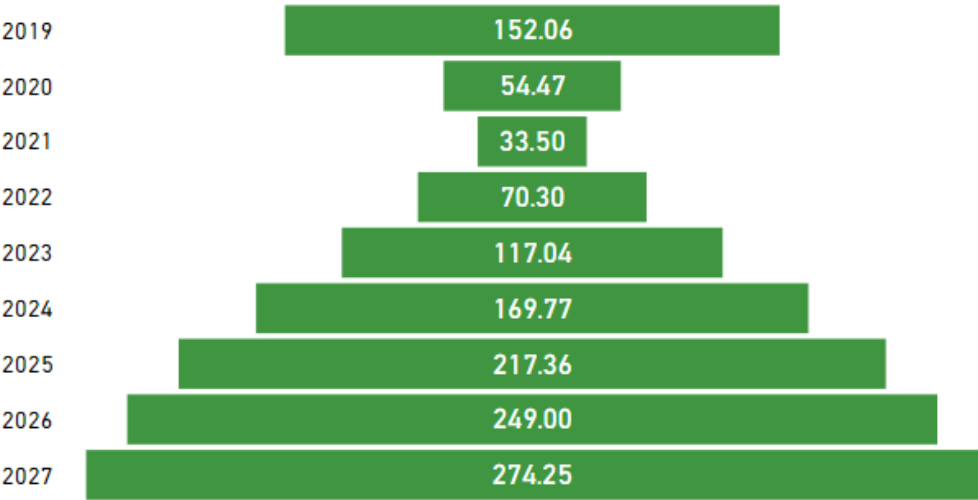
VACCINES

As of the 10th June 2022 approximately 12.4% of Zambia’s population has been fully vaccinated and 33 600 have received booster doses. In January 2022, the health Ministry in Zambia partnered with Zanaco bank to offer vaccine services in their countrywide branches, in a bid offer individuals the needed health services. However, the public still has difficulties in accessing testing centers within the country.

<https://ourworldindata.org/covid-vaccinations>
<https://allafrica.com/stories/202112270248.html>

OUTLOOK

Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Zambia’s arrivals to South Africa are expected to recover to 2019 levels in 2024. Travel from Zambia to South Africa is expected to grow by 116% in 2022.



KEY MEASURE PERFORMANCE



Year MonthName	2021			2022		
	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %	Arrivals	Total Arrivals YoY change %	Total Arrival YTD Change %
January	40,579	-86.1%	-86.1%	62,809	54.8%	54.8%
February	18,689	-88.3%	-86.9%	46,370	148.1%	84.2%
March	29,750	-77.2%	-84.7%	59,852	101.2%	89.9%
April	34,155	-100.0%	-78.9%	90,575	165.2%	110.8%
May	33,343	-100.0%	-73.1%	88,831	166.4%	122.6%
June	34,003	-100.0%	-67.3%	87,756	158.1%	128.9%
July	25,412	-100.0%	-62.9%		-100.0%	102.0%
August	30,981	-100.0%	-57.6%		-100.0%	76.7%
September	34,997	-100.0%	-51.6%		-100.0%	54.7%
October	40,501	115.4%	-46.4%		-100.0%	35.3%
November	41,386	79.2%	-41.8%		-100.0%	19.9%
December	46,934	-21.7%	-40.0%		-100.0%	6.2%
Total	410,730	-40.0%	-40.0%	436,193	6.2%	6.2%

In June 2022 there were 87 756 arrivals from Zimbabwe, the highest number of arrivals to South Africa and the third-highest since the COVID-19 travel restrictions began. Tourist arrivals from Zimbabwe have been steady in the last couple of months of 2021 and into June 2022, showing steady growth.

TRAVEL ADVISORIES

Zimbabwe outbound

If returning Zimbabwean residents are fully vaccinated, they can enter Zimbabwe by presenting a certificate of proof of vaccination (2 doses) by means of one or more of the World Health Organisation-approved vaccines. Alternatively, they can present a valid negative test certificate of a COVID-19 PCR test taken no more than 48 hours prior to departure. Returning residents who do not present proof of vaccination, or the result certificate of a negative COVID-19 test taken no more than 48 hours before their departure to Zimbabwe may be required take a PCR test and to quarantine for 10 days at their own cost.

South Africa inbound

The 21 land borders which are fully operational will remain as such and the 32 land borders which were closed will remain closed.

Traveling to the Republic of South Africa from neighbouring countries is allowed, subject to subregulation (3): Provided that travellers who are-

- (a) fully vaccinated must upon arrival at the land border, produce, a valid vaccination certificate; and
- (b) unvaccinated must upon arrival at the land border, provide a valid certificate of a negative COVID-19 test, recognised by the World Health Organisation, which was obtained not more than 72 hours before the date of travel.

<https://travelbans.org/africa/zimbabwe/>



CONTEXT

Zimbabwe’s annual consumer price inflation rose further to 285% in August 2022, from 256.9% in the July 2022. On a monthly basis, consumer prices rose 12.4%, the least in five months, following a 25.6% jump in the previous month. It was the highest reading since February of 2021, amid general increases across categories of goods and services, especially food, as droughts have led to failed harvests. Meanwhile, the country's currency continued to plunge even after Zimbabwe's central bank had launched gold coins as legal tender in an effort to stabilize the economy.

<https://tradingeconomics.com/mozambique/inflation-cpi>

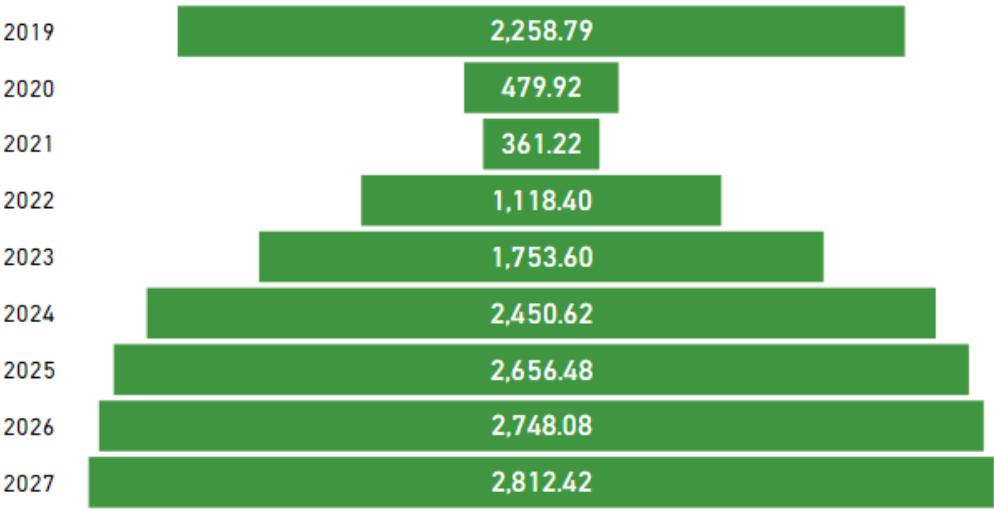
VACCINES

As of the 10th June 2022 approximately 41.5% of Zimbabwe’s population has received at least one dose of the vaccine and 30.1% of Zimbabwe’s population has been fully vaccinated. At least 706 300 have received booster doses. Children, 12 years and above, have now been added to the age group for taking COVID-19 vaccination in Zimbabwe. The new campaign is aimed at rescuing the delayed vaccination programs due to vaccine hesitancy and complacency.

<https://ourworldindata.org/covid-vaccinations>
<https://www.moneyweb.co.za/news/africa/zimbabwes-second-biggest-city-knocks-on-doors-with-covid-shots/>

OUTLOOK

Oxford Economics Arrivals Projections as at 30 June 2022 (000's)



Zimbabwe’s arrivals to South Africa are expected to recover to 2019 levels by 2024, a year earlier than previously forecasted. Travel from Zimbabwe to South Africa is expected to grow by 171% in 2022.

AFRICA

WHAT NEEDS TO HAPPEN – SHORT TERM (2022)

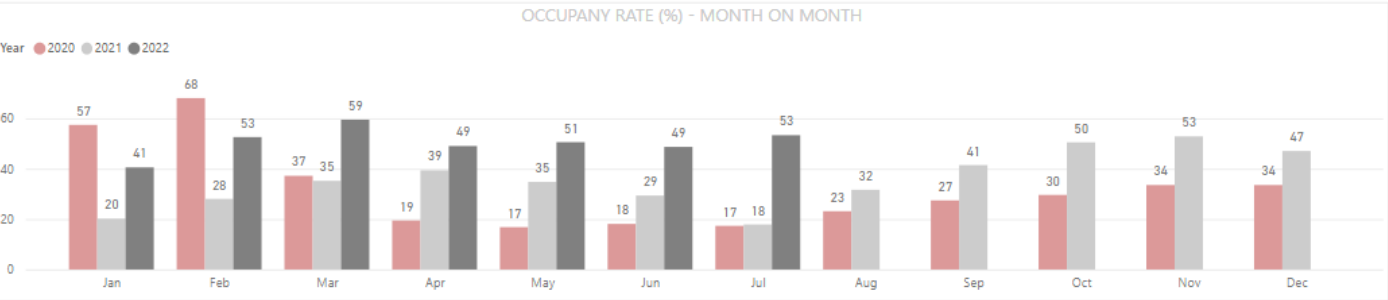
Travel barriers in Africa are visa processing (where relevant), safety/security and welcoming. In addition to COVID-19 travel restrictions and/or requirements and barriers, these have been long-standing issues for the continent. In order for South Africa to unlock travel to South Africa from the continent, a seamless visa processing experience is needed with a quick turnaround time. The introduction of e-visas has assisted in the visa issues. However, there are additional on-the-ground visa application-related issues that African travellers encounter.

Safety/security and welcoming have been major issues, with the recent political unrest exacerbating the issue. Racial profiling is an issue for African travellers, as they feel discriminated against when they visit South Africa. Load shedding can also negatively affect the destination for tourism purposes, as potential travellers might not feel safe travelling to the country. Lack of electricity would affect a number of tourism experiences, attractions and products.

The South African government needs to officially communicate and showcase that South Africa is a welcoming destination. And also illustrate the initiatives the government is doing to combat or deal with crimes in South Africa.

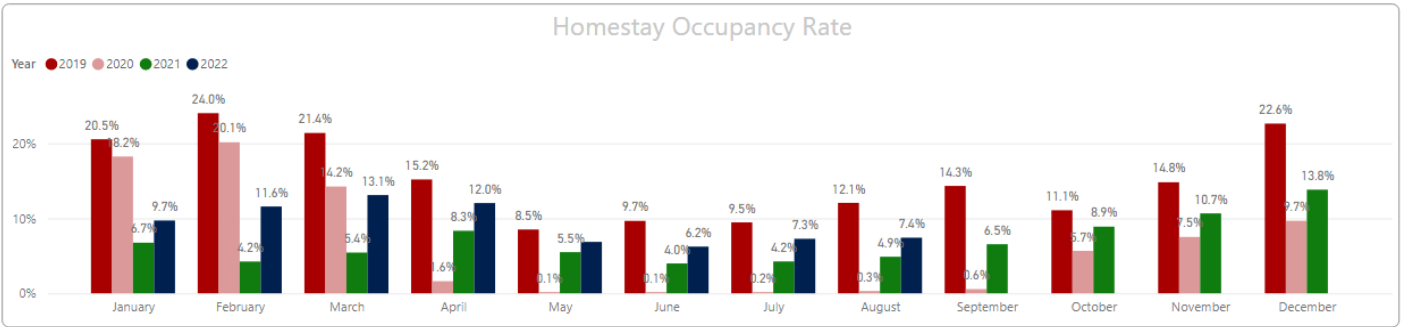
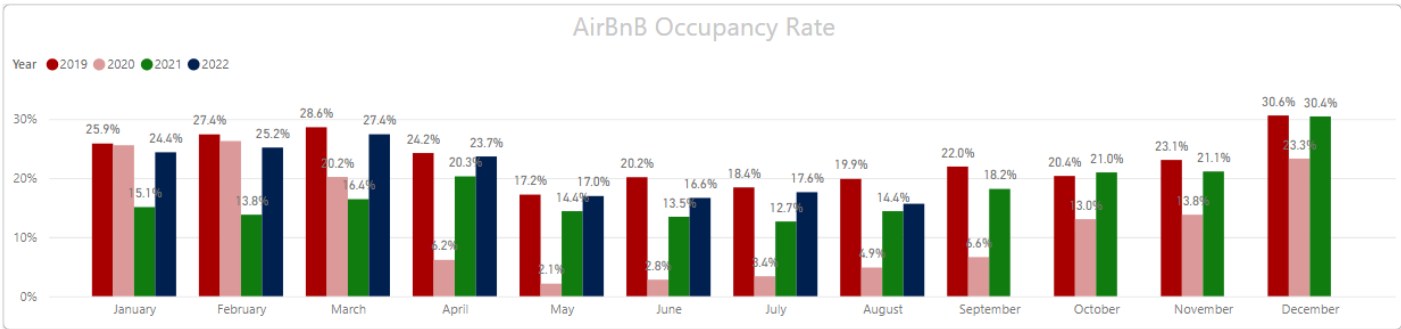
OCCUPANCY PERFORMANCE

HOTEL PERFORMANCE



Hotel occupancy rates peaked in July 2022 to 51%, after a dip from 49% in June 2022. The top performing hotels in June 2022 were those that are in the Drakensberg and Midlands region, followed by hotels in the Eastern Cape region. In July 2022, hotel occupancy rates increased for all 3-star to 5-star hotels.

SHORT-TERM RENTAL PERFORMANCE



Airbnb's occupancy rate was 14,4% in August 2022, which was a drop from July 2022 at 17,6%. The Homestay occupancy rate was at 7,4% in August 2022, a marginal increase from 7,3% in July 2022, and still a recovery from the low occupancy rates for May and June 2022.