



**MINISTER
TOURISM
REPUBLIC OF SOUTH AFRICA**

Private Bag X 424, PRETORIA, 0001, Tourism House, 17 Trevenna Street, Sunnyside, PRETORIA, 0002, Switchboard: +27 (0)12 444 6000, Fax: +27 (0)12 444 7000, Website: www.tourism.gov.za

NATIONAL ASSEMBLY

QUESTION FOR ORAL REPLY:

Question Number: 429 (previously written reply 1949)
Date of Publication: 23 APRIL 2026
NA QP Number: 7
Date of reply: 6 MAY 2026

429. Ms H Ismail (DA) to ask the Minister of Tourism:

- (1) With reference to the general strategy of the Tourism Route Development Marketing Plan (TRDMP), (a) what specific market research has been conducted to identify new target markets for SA Tourism (SAT), (b) how does TRDMP intend to address the decline in tourism from traditional source markets, (c) what strategies are in place to address seasonal swings and ensure consistent tourism revenue throughout the year and (d)(i) what is the expected return on investment for the TRDMP and (ii) how will it be measured and evaluated in the next three to five years;
- (2) with reference to TRDMP's partnerships, air routes and aviation strategy, (a) what specific partnerships has SAT established with airlines and tourism operators to promote South African tourism, (b) what agreements are in place with any international and/or domestic entities that demonstrate how the route would be supported and lead to increased arrivals or marketing activities for the destination, (c) what was the (i) purpose of attending the World Routes Conference and (ii) cost of attending the conference and (d) which new airlines and routes were secured for the Republic following the attendance?

NW2173E

REPLY:

- (1) a) Cabinet approved the Tourism Route Development Marketing Plan (TRDMP) on 4 December 2024, mandating South African Tourism (SAT) to implement the plan over 18 months. SAT appointed a service provider in March 2026 to operationalise the TRDMP.

The TRDMP is grounded in extensive market and aviation research undertaken during its development and implementation, including:

Analysis of global and regional airlift capacity shows that South Africa recorded a 7% growth in international airlift capacity over the past year. However, South Africa remains below pre-pandemic seat capacity levels.

Identification of under-served and unserved markets, including India, China, Japan, Spain, Italy, Canada, Russia and others.

Benchmarking international route development programmes in Saudi Arabia, Malaysia, Scotland, the Canary Islands, Australia, Brazil, and the United States of America to determine competitive incentive models and best practices.

Assessment of airline decision-making factors, including return on investment (ROI) thresholds, seasonality, load factors, and market stimulation requirements.

This research forms the basis for identifying new target markets and prioritising routes requiring coordinated national support.

- b) The TRDMP directly addresses the decline in tourism from traditional source markets by:
- Strengthening air connectivity through route retention, expansion and new route introduction.
 - Providing coordinated national marketing support for airlines to stimulate demand and improve route viability.
 - Ensuring alignment between national, provincial and private-sector route development structures, eliminating duplication and fragmented efforts that previously weakened South Africa's competitiveness.
 - Supporting airlines with route-launch marketing activations, joint campaigns and media hosting to stimulate demand (e.g., Qantas Johannesburg–Perth launch; SAA Cape Town–Mauritius launch).
- c) The TRDMP includes explicit measures to address seasonality and stabilise year-round tourism revenue:

- One of the core deliverables is to “open new tourism source markets, grow and sustain existing markets, and address seasonality through route development” as presented to the Portfolio Committee in March 2026.
 - By expanding connectivity into Asia, the Middle East, and Africa, the plan targets markets with counter-seasonal travel patterns, reducing reliance on traditional peak-season markets.
 - The plan also supports year-round route launches, co-marketing campaigns and incentive-driven activations to maintain consistent demand.
- d) (i) The TRDMP is designed to support South Africa’s national target of 15 million arrivals by 2030. While the TRDMP is not a financial subsidy programme, its expected return on investment is measured through:
- Increased direct air access, including new routes and increased frequencies.
 - Increased seat capacity to South Africa.
 - Growth in international arrivals attributable to improved connectivity.
 - Improved route sustainability through coordinated marketing support.
- (ii) Evaluation will occur through:
- Quarterly and annual reporting against SAT’s Air Access KPIs, including the number of TRDMP initiatives implemented.
 - SAT is working with the service provider to prepare an update report to the SAT Board and Minister on the TRDMP. This will inform an update
 - Monitoring of seat capacity growth, which has already increased by 7% year-on-year.
 - Tracking of route performance, including visitor numbers following new route launches.
- (2)a) SAT has established and strengthened partnerships with airlines and aviation stakeholders through the TRDMP, including:
- Qantas (Johannesburg–Perth route launch).
 - South African Airways (Cape Town–Mauritius; increased frequencies to Lagos, Accra, São Paulo; Gaborone launch).
 - Singapore Airlines, Cathay Pacific, Air Tanzania, Airlink, Fastjet, LATAM, Emirates, Qatar Airways, Virgin Atlantic, Condor, and others (Portfolio Committee presentation, “Recent Developments”).
 - Collaboration with ACSA, TBCSA, and provincial air access structures (Cape Town Air Access, Durban Direct, Gauteng Air Access Network).
- These partnerships include joint marketing, route-launch activations, media hosting, and coordinated engagement at global aviation platforms.
- b) Agreements and coordinated support include:
- Joint business cases developed with provincial air access teams.

- Co-funded route-launch marketing activations (Qantas, SAA).
- Shared pavilions and coordinated engagements at global route development events.
- Collaborative campaigns with airlines to stimulate demand and support route sustainability.

These demonstrate clear commitments to supporting routes through marketing, trade engagement and media exposure.

- c) (i) The purpose of attending the Routes World Conference is to engage directly with global airline network planners, present South Africa's route development value proposition, negotiate new routes, and strengthen relationships with existing carriers. It is the primary global platform for securing airlift.
- (ii) SAT typically covers the cost of floor space and contributes to the shared stand build with ACSA and provincial partners. To this end, SAT covered the floor space with a value of R1.3 million while the stand build cost of R1.3million was shared with co-exhibitors, including ACSA and the Provincial Air Access Committees.
- d) Route development is a long-term process, and outcomes materialise over multiple seasons. However, following South Africa's participation in global route development platforms and coordinated TRDMP efforts, several new or expanded routes have been secured or announced, including:
- Qantas Johannesburg–Perth
 - SAA Cape Town–Mauritius
 - LATAM São Paulo–Cape Town (from September 2026)
 - Air Tanzania Zanzibar–Johannesburg
 - Airlink Nacala–Johannesburg
 - Air Algeria Algiers–Johannesburg
 - Air Europa Madrid–Johannesburg (from late 2026)
 - Emirates third daily Cape Town flight
 - Singapore Airlines increased frequencies
 - Cathay Pacific daily Johannesburg service

These contribute to the 7% growth in international airlift recorded over the past year.

END