ZIMBABWE
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%

1 in 4 net new jobs were created by Travel & Tourism over the last five years

Global GDP impact by sector (2018 data). Share of total economy GDP

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy</th>
<th>GDP Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0.1%</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>0.3%</td>
<td>0%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>1.2%</td>
<td>0%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>6.0%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Retail</td>
<td>3.5%</td>
<td>0%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>4.6%</td>
<td>0%</td>
</tr>
</tbody>
</table>

10.3% Total GDP contribution

330 MN Jobs globally (1 in 10 jobs)

ZIMBABWE 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

6.0% OF TOTAL ECONOMY

Total T&T GDP = USD1,264.2MN

160.7 JOBS (000's)
(6.2% of total employment)

USD 197.0 MN in visitor spend (4.4% of total exports)

INBOUND ARRIVALS

1. SOUTH AFRICA 20%
2. MALAWI 18%
3. ZAMBIA 14%
4. NAMIBIA 9%
5. MOZAMBIQUE 8%
REST OF WORLD 31%

OUTBOUND DEPARTURES

1. SOUTH AFRICA 62%
2. BOTSWANA 17%
3. ZAMBIA 8%
4. MOZAMBIQUE 4%
5. MALAWI 3%
REST OF WORLD 6%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

INBOUND ARRIVALS

OUTBOUND DEPARTURES

SECTOR CHARACTERISTICS (2019)

Leisure Spending: 88%
Business Spending: 12%
Domestic Spending: 80%
International Spending: 20%

All values are in constant 2019 prices & exchange rates
As reported in March 2020