

# SOUTH AFRICAN TOURISM



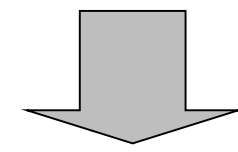
# Departure Survey

## Background to the departure survey

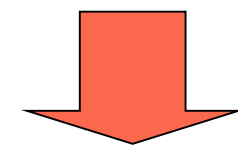
Since 2002, South African Tourism has commissioned a monthly survey of departing foreign visitors, 18 years and older, exiting through OR Tambo International Airport, Cape Town International Airport, and the land border posts with the cooperation of SARS, Home Affairs, and ACSA.

## Objectives of the departure survey

The main objective of the survey is to collect information on foreign tourists who visited SA



The aim of this survey has been to understand and track the travel and expenditure patterns of foreign tourists as well as to gain information on which sites and attractions were visited. The survey provides information that is used to track our performance against our KPIs and also helps us to enhance our marketing strategies.

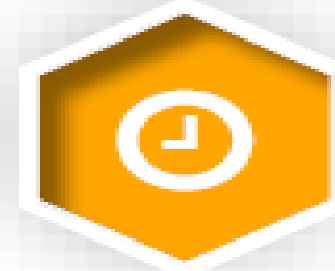


The Key Objective of the survey is to capture information on the following critical areas :



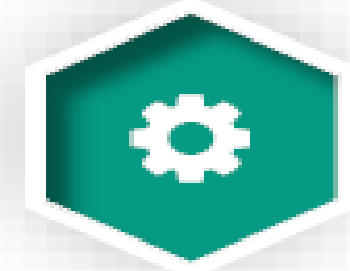
Reasons for visiting South Africa

Time spent in South Africa



Attractions visited when in South Africa

Expenditure patterns while in South Africa



Decision-making process to visit South Africa

Arrangements during travel



Overall impression of their visit to South Africa

Travel to other African countries



Personal demographic information

# Sampling Size & Methodology



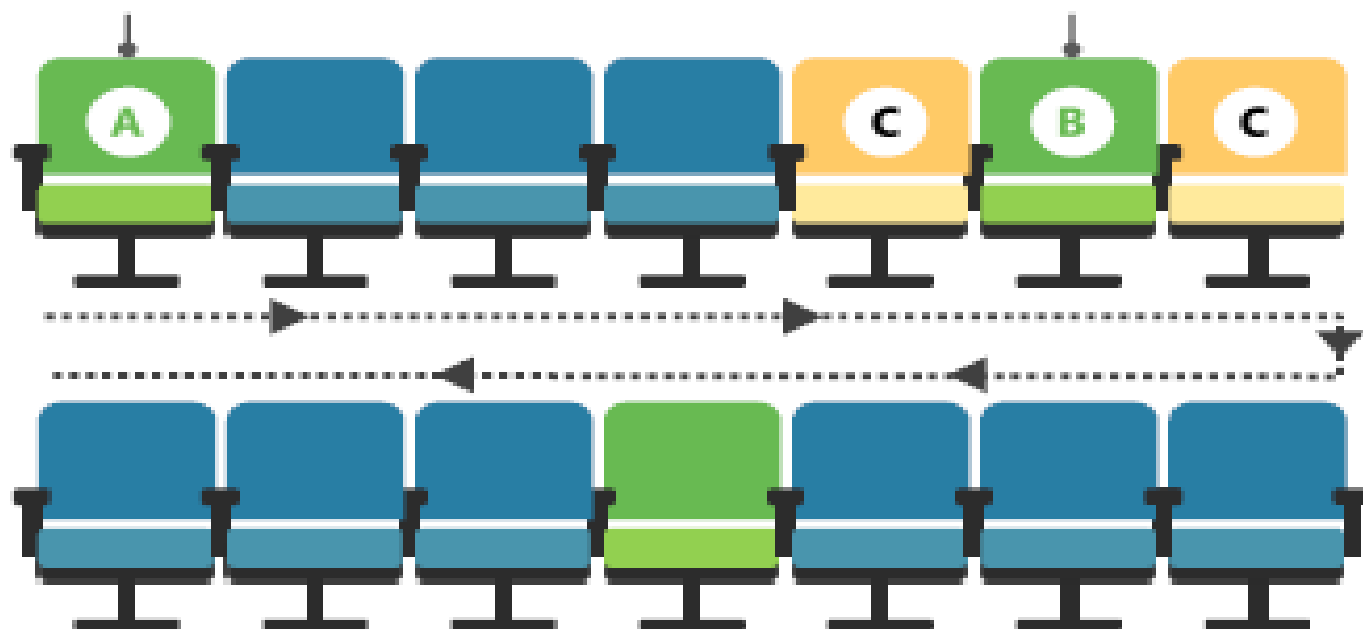
- A** Departure Survey uses Probability Samples, which are based on taking a given number of units of analysis from a list, or sampling frame, such that every individual from the population under study has exactly the same chance of being selected.
- B** The main sampling method is stratified sampling, where within each stratum, 1-in-k systematic random sample with a random start is leveraged to draw a sample. The designated seats are rotated forward in a clockwise direction at the beginning of each week.

**Stratified probability sampling is used, with random 1-in-5 systematic sampling within each strata.**

## Sampling

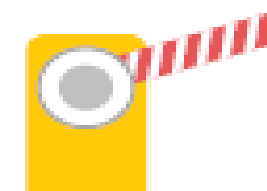
**The interviewers intercept and randomly sample respondents across three interception points using the 1-in-5 sampling.**

**A** The interviewer randomly selects one of the respondents from the first five seats



**B** After that, they select every fifth respondent (moving in a clockwise manner)

**C** In case the fifth seat is empty, they select the respondent in the fourth seat. If this is also empty, they select the respondent in the sixth seat.



**Border Arrival Gates**  
Interviewer team supervisor approaches every fifth respondent/party and pre-recruits them.



**Formalities**  
Interview is confirmed at this interception point



**Departure Preparation**  
Interview is conducted at this interception point

*Note:<sup>2</sup> There is no structured waiting time before departure at the land border posts, which are characterized by overcrowding and rush to be served first. The interview is conducted across three interception points to ensure high quality.*

# Selection of Respondents

The survey responses are collected from international tourists, who are identified using the following six criteria:



Must not be a South African resident



Must have spent at least one night in South Africa



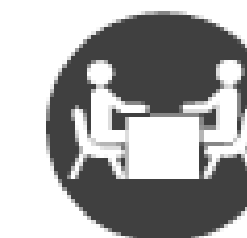
Must not have spent more than 365 days in South Africa



Must have spent time in South Africa outside the airport



Must not have received an income while in South Africa



Must not have been interviewed by SA Tourism in the last six months

## Data Collection method



**Current Method**

## Suitability Data Collection platforms

Airport and Land Border Post Intercepts is the best-suited methodology to deliver against the objectives of the Departure Survey, as its advantages significantly outweigh its disadvantages.

### ADVANTAGES



**Objectives Coverage**  
High coverage is of the objectives



**Setup**  
Relatively easier to setup compared to other available methodologies



**Data Collection**  
Cost-efficient post the initial setup cost as data is collected through Tablet-assisted Personal Interviews



**Data Quality**  
High data quality as information meets expected quality standards, data has high completeness and response rate/non-sampling errors are minimal



**Sampling**  
Ensures Sampling frame is representative of the universe, as it uses probability sampling.

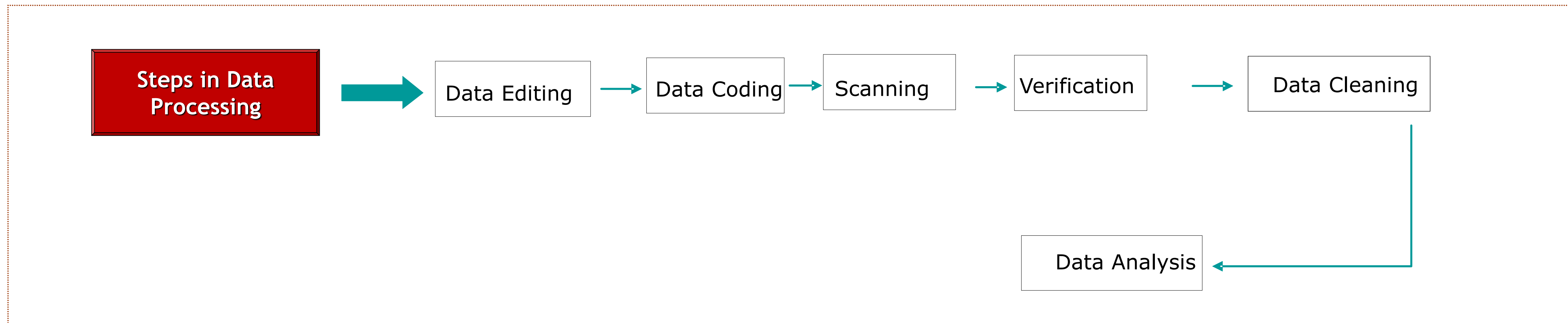
### DISADVANTAGES



**Cost**  
The methodology is costlier due to high involvement process

# Data Processing

Once the fieldwork is completed, questionnaires are prepared for scanning through editing and coding process. After all the questionnaires are edited and a coding frame is designed for all open-ended questions.



The research vendor has put measures to ensure that no errors occur during all the data processing stages which include:

- Editing error
- Coding error
- Scanning error
- Weighting error

# Data Weighting



The weighting is based on extrapolating the number of “tourist arrivals” per country (Stats SA data) onto survey respondent’s “Country of Residence” sample. e.g. the total sample of UK is 1800 and the arrivals in a particular quarter is say 38 000. The weighting factor for UK for that quarter will be  $(38\ 000/1800)$ .

The data is weighted by air and road only since the interviews are conducted at only these two interventions.

Over the past years the data was weighted using the total arrivals to South Africa since SA Tourism was not able to get the data for tourist arrivals.

The data for tourist arrivals has been available since 2009.

Comparisons will still be made with previous data to track the changes.

# Analysis and Reporting

## SA Tourism

- Conducts all analysis using SPSS
- Reports on the data for both internal and external stakeholders

### Quarterly reports

- A consolidated view of all foreign tourist trips in the quarter
- Combines arrivals stats and departure survey stats
- Reports on key metrics, i.e. arrivals, spend, length of stay, provincial distribution, satisfaction levels
- Report released every 3 months (with about 1 quarter lag)



### Annual reports

- A consolidated view of the calendar year
- Combines arrivals stats and departure survey stats
- Reports on key metrics, i.e. arrivals, spend, length of stay, provincial distribution, satisfaction levels
- Report released once a year.

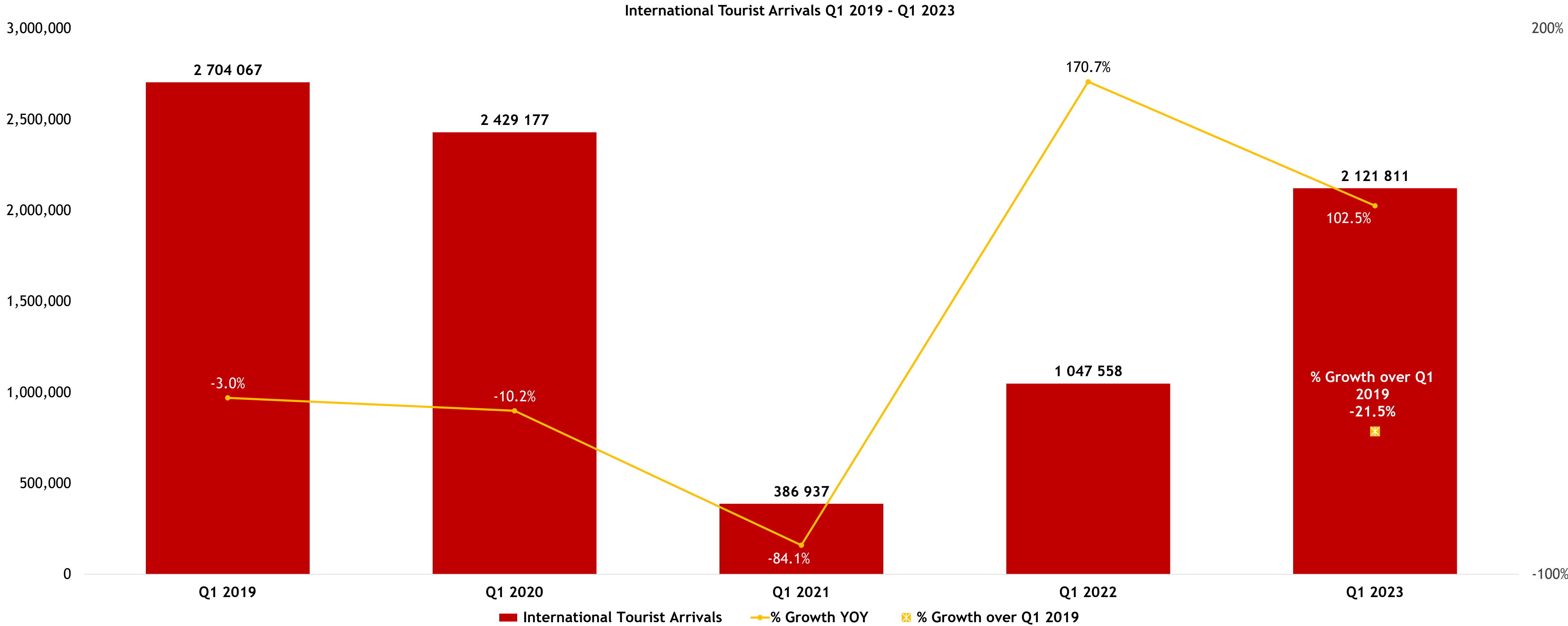




# International tourist latest results

# International Arrivals to South Africa Q1 2019- Q3 2023

International tourist arrivals increased by 102,5% amounting to 2,1 million arrivals in Q1 2023 compared to Q1 2022, however, this was 21.5 % below the Q1 2019 Performance level.



Source: Stats SA Tourism & Migration Report 2023



# Tourist Arrivals by Regions Q1 2023

International tourist arrivals saw an increase in Q1 2023 of 102,5% reaching 2,1 million arrivals compared to the same period in Q1 2022 . Africa received highest share of arrivals amounting to 1,6 million, an increase of 99,3% compared to the same period last year and Europe followed with 0,4 million.

| Arrivals by Region | Q1 2019   | Q1 2020   | Q1 2021 | Q1 2022   | Q1 2023   | Q1 2023 Performance over Q1 2019 | Q1 2023 Performance over Q1 2022 | Share of Arrivals |
|--------------------|-----------|-----------|---------|-----------|-----------|----------------------------------|----------------------------------|-------------------|
| Africa             | 1 984 554 | 1 825 354 | 344 285 | 778 313   | 1 551 123 | -21,8%                           | 99,3%                            | 73,1%             |
| Africa Land        | 1 897 165 | 1 758 573 | 328 851 | 742 008   | 1 491 793 | -21,4%                           | 101,0%                           | 70,3%             |
| Africa Air         | 87 389    | 66 781    | 15 434  | 36 305    | 59 330    | -32,1%                           | 63,4%                            | 2,8%              |
| Europe             | 467 791   | 404 912   | 24 640  | 192 949   | 387 296   | -17,2%                           | 100,7%                           | 18,3%             |
| Americas           | 134 195   | 111 534   | 7 729   | 44 600    | 104 990   | -21,8%                           | 135,4%                           | 4,9%              |
| Asia               | 75 385    | 50 003    | 7 813   | 17 910    | 39 671    | -47,4%                           | 121,5%                           | 1,9%              |
| Australasia        | 26 634    | 23 520    | 640     | 7 152     | 24 623    | -7,6%                            | 244,3%                           | 1,2%              |
| Middle East        | 11 908    | 10 859    | 1 158   | 4 976     | 11 075    | -7,0%                            | 122,6%                           | 0,5%              |
| Total              | 2 704 067 | 2 429 177 | 386 937 | 1 047 558 | 2 121 811 | -21,5%                           | 102,5%                           | 100,0%            |

# Total Foreign Direct Spend (TFDS) Q1 2019- Q1 2023

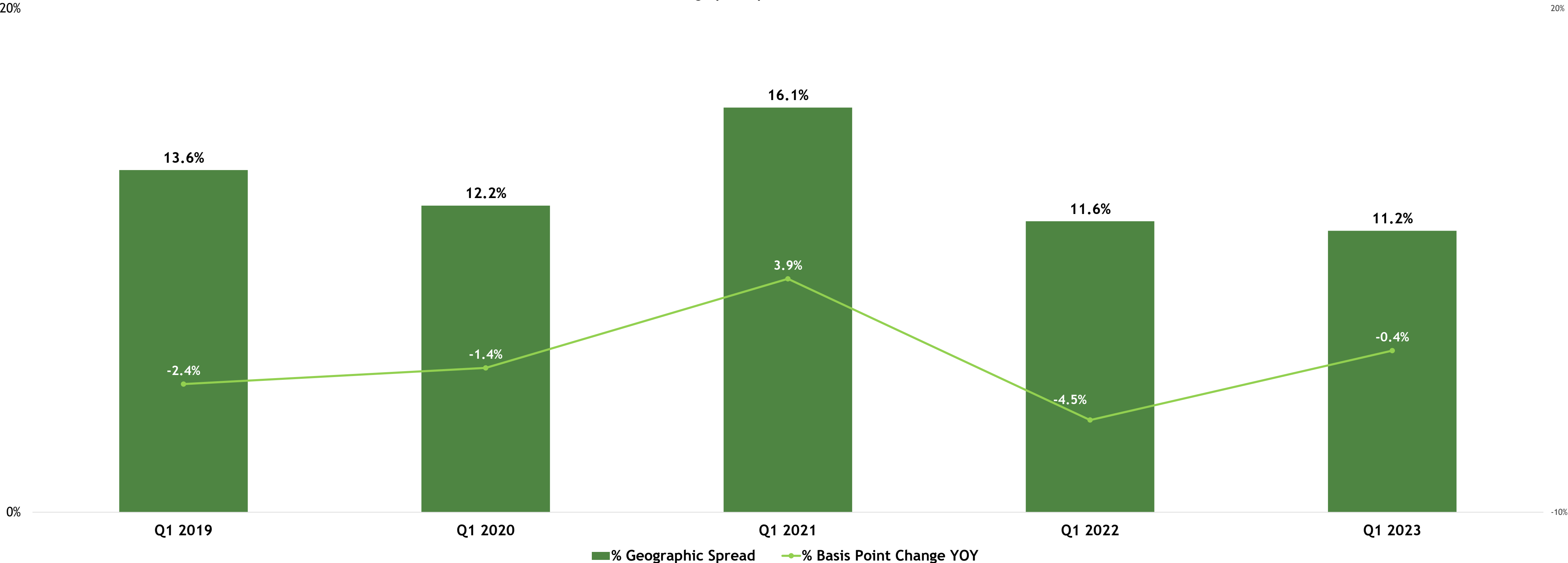
International tourist arrivals saw an increase in Jan-May 2023 of 83,7% reaching 3,5 million arrivals compared to the same period in 2022. Africa received the highest share of arrivals amounting to 2,6 million, an increase of 85,2% compared to the same period last year and Europe followed with 0,5 million.

| Spend by Region | Q1 2019          | Q1 2020         | Q1 2021        | Q1 2022         | Q1 2023         | Q1 2023 Performance over Q1 2019 | Q1 2023 Performance over Q1 2020 | Q1 2023 Performance over Q1 2022 |
|-----------------|------------------|-----------------|----------------|-----------------|-----------------|----------------------------------|----------------------------------|----------------------------------|
| Africa          | R 7 887 112 679  | R7 780 063 324  | R3 058 677 957 | R3 823 026 005  | R9 304 620 867  | 18,0%                            | 19,6%                            | 143,4%                           |
| Africa Land     | R 6 504 898 608  | R6 654 774 755  | R2 921 840 890 | R3 106 211 050  | R8 046 671 033  | 23,7%                            | 20,9%                            | 159,1%                           |
| Africa Air      | R 1 382 214 072  | R1 125 288 569  | R136 837 067   | R716 814 955    | R1 257 949 834  | -9,0%                            | 11,8%                            | 75,5%                            |
| Europe          | R 12 622 260 167 | R7 879 007 505  | R916 100 734   | R4 755 925 036  | R10 828 801 413 | -14,2%                           | 37,4%                            | 127,7%                           |
| Americas        | R 3 009 302 541  | R2 264 929 425  | R313 766 763   | R1 230 189 959  | R3 295 520 494  | 9,5%                             | 45,5%                            | 167,9%                           |
| Asia            | R 1 298 823 009  | R851 561 118    | R115 978 794   | R289 713 135    | R932 098 015    | -28,2%                           | 9,5%                             | 221,7%                           |
| Australasia     | R 542 560 157    | R485 925 600    | R62 669 419    | R193 978 575    | R717 563 080    | 32,3%                            | 47,7%                            | 269,9%                           |
| Middle East     | R 224 720 489    | R181 170 928    | R22 459 068    | R99 553 743     | R269 701 564    | 20,0%                            | 48,9%                            | 170,9%                           |
| Total           | R 25 584 779 042 | R19 442 657 899 | R4 489 652 734 | R10 392 386 454 | R25 348 305 434 | -0,9%                            | 30,4%                            | 143,9%                           |

# Geographic Spread Q1 2023

South Africa’s geographic spread index has declined further this quarter to reach 11.2%. This loss of -0.4% basis points over Q1 2022 is not dramatic but the index remains far removed from Q1 2019’s 13.6%.

% Geographic Spread Q1 2019 - Q1 2023



Source :Departure Survey SAT ,Q1 2023  
 \*Geographic spread being the share of tourists visiting 2 provinces or more

# CONCLUSION

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- The cumulative period of Q1 2023 saw a significant surge in international tourist arrivals, reaching a total of 2.1 million. This reflects a marked resilience in the tourism sector.
- Arrivals performed at minus 21,5% below 2019 levels, The global performance is minus 20% below 2019 levels.
- Africa continues to dominate as the largest source continent for tourists, contributing to 73.1% of the total arrivals.
- Europe retains its position as the second highest contributor to tourist arrivals, holding a share of 18.3%.
- Travellers were particularly concerned for their safety while visiting South Africa. However, tourists were impressed by the natural scenery of the country as well as its remarkable infrastructure.
- Concerns raised include loadshedding, water issues at some border posts, and the high crime rate. Travellers were particularly concerned about criminal activity reportedly carried out by police officials, and the potential effect that it would have on themselves when touring South Africa. South Africa's high quality and wide variety of goods and natural wonders encourage tourists to visit the country.
- Foreign spending continues to show significant recovery and now equals ZAR 25.3 billion due to very slight negative growth of -0.9% over Q1 2019. Also compared to Q1 2022, spend is much improved (+143.9% vs. Q1 2022).
- Load shedding is increasingly creating a security risk in the country. Travellers complained about the slow service caused by loadshedding and how it caused delays in traffic, as well as the high cost of goods and petrol.

***Thank you!***