

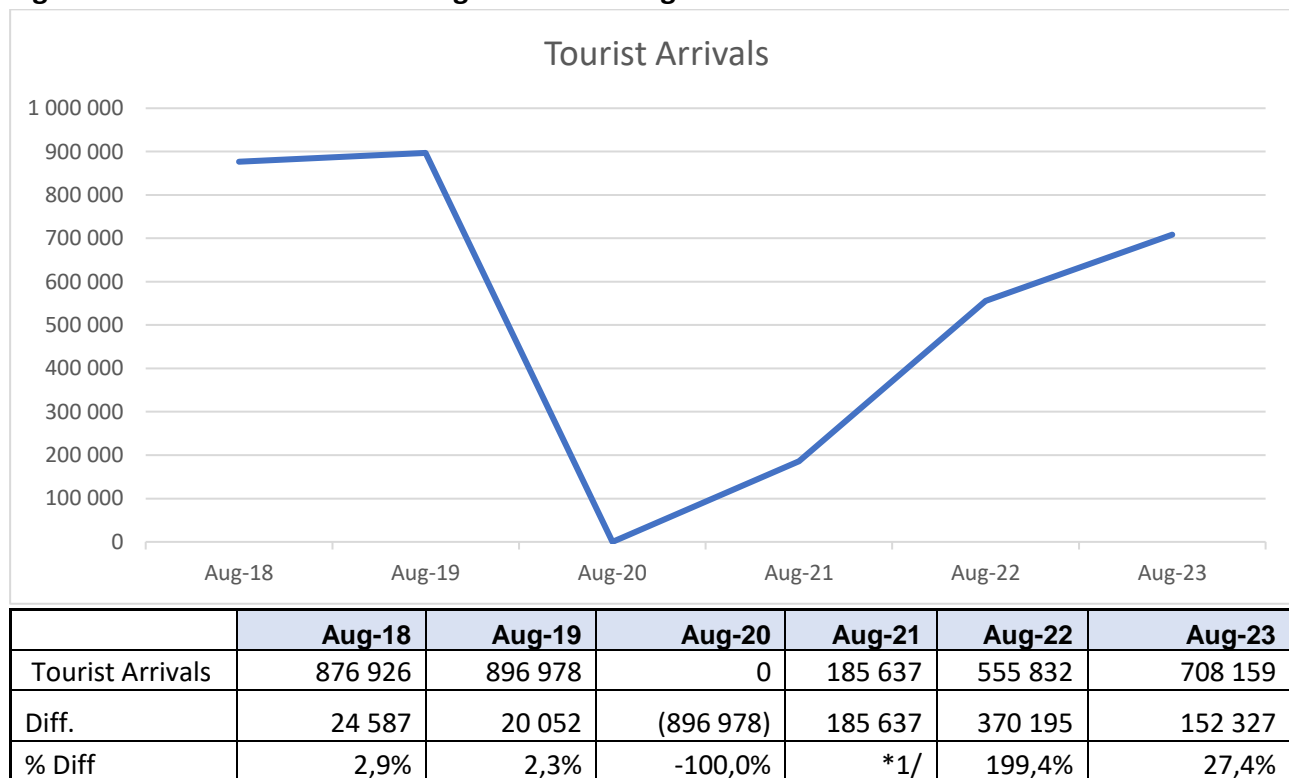
SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR AUGUST 2023

Statistics South Africa (Stats SA) has published data on the number of tourists for August 2023 and this report provides further analysis of the tourists that travelled to South Africa during this period.

TREND ANALYSIS: AUGUST 2018 – AUGUST 2023

A total of 708 159 tourist arrivals was recorded in August 2023 which was an increase of +27,4% (+152 327) compared to the same month in 2022. Figure 1 below indicates tourist arrivals for the period August 2018 to August 2023. Tourist arrivals increased from 876 926 in 2018 to 896 978 in 2019 which was an increase of +2,3% (+20 052). Tourist arrivals decreased from 896 978 in 2019 to 0 in 2020 due to the impact of COVID-19. Tourist arrivals then increased from 0 in 2020 to 185 637 in 2021. Tourist arrivals increased by +199,4% (+370 195) in 2022 compared to 2021. Tourist arrivals recorded during August 2023 was at -21,1% level of tourist arrivals recorded in 2019 pre-COVID period.

Figure 1: Total Tourist Arrivals August 2018 to August 2023



**Changes from zero in the preceding period cannot be calculated as a percentage*

Source: Stats SA Tourism and Migration report, August 2023 and tourist arrivals data cuts

AUGUST 2023 COMPARED TO AUGUST 2022 BY REGION

Table 1 below indicates tourist arrivals by region for August 2023 compared to the same month in 2022. All regions experienced a growth in tourist arrivals during this month compared to the same month of the previous year. With regards to percentage growth Asia recorded the highest increase of +69,4% (+7 713) followed by Australasia (+47,9%; +2 819), Middle East (+28,5%; +1 983), Europe (+20,0%; +15 614), North America (+16,2%; +4 597) and Central and South America with (+9,0%; +222) respectively. Africa recorded an increase of +28,3% (+119 320) and this region remains the main source of tourist arrivals to the country accounting for 76,5% (+541 567) of total tourist arrivals during August 2023.

Table 1: Total Tourist Arrivals by Region: August 2023 vs. August 2022

	August 2022	August 2023	Diff	% Diff
EUROPE	77 988	93 602	15 614	20,0%
NORTH AMERICA	28 336	32 933	4 597	16,2%
CENTRAL & SOUTH AMERICA	2 475	2 697	222	9,0%
AUSTRALASIA	5 883	8 702	2 819	47,9%
MIDDLE EAST	6 958	8 941	1 983	28,5%
ASIA	11 117	18 830	7 713	69,4%
TOTAL OVERSEAS	132 757	165 705	32 948	24,8%
TOTAL AFRICA	422 247	541 567	119 320	28,3%
Unspecified	828	887	59	7,1%
GRAND TOTAL	555 832	708 159	152 327	27,4%

Source: Stats SA Tourism and Migration Report, August 2023 and tourist arrivals data cuts

JANUARY-AUGUST 2023 COMPARED TO JANUARY-AUGUST 2022/19 AND BY REGION

Tourist arrivals figures by region for the period January-August 2023 compared to the same period in 2022 and 2019 are indicated in table 2 below. Total tourist arrivals went up by +63,4% (+2 124 525) for the period January-August 2023 compared the same period in 2022. Total tourist arrivals from the overseas market increased by +59,4% (+488 260). Australasia (+112,3%) recorded the highest increase followed by Asia (+87,7%), Europe (+55,1%), Middle East (+54,4%), Central & South America (+53,7%) and North America (+52,0%).

In Australasia, Australia recorded the highest increase in volume having an increase of 28 580 (+106,3%) followed by New Zealand (+7 098; +142,4%). In Asia, India recorded the highest increase in volume (+21 669; +65,3%). The United Kingdom had recorded the highest increase in volume (+64 688; +39,4%) in the Europe region. In North America, USA has recorded the highest increase in volume (+76 816; +48,5%). Israel recorded the highest increase in volume for the Middle East region

with an additional 5 131 tourists compared to January-August 2022. In Central and South America, Brazil recorded the highest increase in volume (+3 586; +41,2%) for the same period under review.

Tourist arrivals from Africa increased by +64,8% (+1 633 808) during the same period under review and this region remains the main source of tourist arrivals to the country accounting for 75,9% (4 154 862) of total tourist arrivals during January-August 2023.

In terms of volume the increase recorded from the African continent was driven by an increase of (+683 423; +99,1%) from Zimbabwe followed by Mozambique (+297 146; +51,1%) and Lesotho (+274 652; +52,6%) refer to table 2.1 below.

To monitor the recovery of tourist arrivals performance post COVID-19, the table below also compares tourist arrivals performance for the period January-August 2023 to January-August 2019. Tourist arrivals recorded during January-August 2023 was at -19,3% level of tourist arrivals recorded in January-August 2019 pre-COVID period. Compared to other regions, the Middle East is the only region that showed a growth of 13,8% during January-August 2023 compared to January-August 2019. North America reached 91,8% of January-August 2019 tourist arrivals, followed by Europe (80,5%). Africa recovered 81,3% of its pre-pandemic tourist arrivals during January-August 2023 compared to January-August 2019. During January-August 2023, the Central and South America region only reached 33,2% of January-August 2019 tourist arrivals.

TABLE 2: JANUARY-AUGUST 2023 COMPARED TO JANUARY-AUGUST 2022

Region	January-August 2022	January-August 2023	2023 compared to 2022 Diff	2023 compared to 2022 %	January-August 2019	2023 compared to 2019 %	2023 Share of 2019 (%)
EUROPE	500 662	776 430	275 768	55,1%	964 208	-19,5%	80,5%
NORTH AMERICA	177 202	269 348	92 146	52,0%	293 449	-8,2%	91,8%
CENTRAL & SOUTH AMERICA	16 502	25 363	8 861	53,7%	76 310	-66,8%	33,2%
AUSTRALASIA	31 905	67 724	35 819	112,3%	80 670	-16,0%	84,0%
MIDDLE EAST	26 532	40 957	14 425	54,4%	36 006	13,8%	113,8%
ASIA	69 832	131 073	61 241	87,7%	208 340	-37,1%	62,9%
TOTAL OVERSEAS	822 635	1 310 895	488 260	59,4%	1 658 983	-21,0%	79,0%
TOTAL AFRICA	2 521 054	4 154 862	1 633 808	64,8%	5 113 652	-18,7%	81,3%
Unspecified	5 713	8 170	2 457	43,0%	9 727	-16,0%	84,0%
GRAND TOTAL	3 349 402	5 473 927	2 124 525	63,4%	6 782 362	-19,3%	80,7%

Source: Stats SA Tourism and Migration Report. August 2023 and tourist arrivals data cuts and 2019 data cuts

Table 2.1 below gives the rankings of the top ten African source markets for the period January-August 2023 compared to January-August 2022. All of the top ten African source markets remained in the same position except for Kenya moving from 11th position in 2022 to 10th position in 2023 replacing Tanzania. All top ten countries recorded a positive growth with Kenya recording the highest increase of +106,6% followed by Zimbabwe (+99,9%) and Eswatini (+87,0%).

Table 2.1: South Africa's Top 10 African Source Markets: January-August 2023 vs. January-August 2022

Country	Rank: January-August 2023	Tourist Arrivals January-August 2023	Rank: January-August 2022	Tourist Arrivals January-August 2022	% Change
Zimbabwe	1	1 373 282	1	689 859	99,1%
Mozambique	2	878 309	2	581 163	51,1%
Lesotho	3	797 011	3	522 359	52,6%
Eswatini	4	462 071	4	247 145	87,0%
Botswana	5	210 625	5	144 901	45,4%
Namibia	6	100 876	6	83 906	20,2%
Zambia	7	90 580	7	72 227	25,4%
Malawi	8	84 656	8	65 710	28,8%
Angola	9	26 615	9	19 653	35,4%
Kenya	10	25 002	11	12 103	106,6%

Source: Stats SA Tourism and Migration Report. August 2023 and tourist arrivals data cuts

Table 2.2 shows the rankings of the top ten overseas source markets. Comparing January-August 2023 with January-August 2022. all top 10 overseas markets recorded an increase in tourist arrivals with Australia recording the highest increase of +106,3%. Most of the top ten overseas markets moved their position except for Germany, The Netherlands and France which remained in the 3rd, 4th and 5th positions respectively during the period under review. USA replaced UK as the main source market from overseas recording a growth of +48,5%.

Table 2.2: South Africa's Top 10 Overseas Source Markets: January-August 2023 vs. January-August 2022

Country	Rank: January-August 2023	Tourist Arrivals January-August 2023	Rank: January-August 2022	Tourist Arrivals January-August 2022	% Change
USA	1	235 315	2	164 001	48,5%
UK	2	228 689	1	158 499	39,4%
Germany	3	144 660	3	86 868	66,5%
The Netherlands	4	79 876	4	51 532	55,0%
France	5	77 498	5	44 588	73,8%
Australia	6	55 455	7	33 198	106,3%

India	7	54 867	6	26 875	65,3%
Italy	8	35 528	9	19 511	82,8%
Canada	9	34 033	10	19 431	82,0%
Belgium	10	28 574	8	18 703	46,5%

Source: Stats SA Tourism and Migration Report. August 2023 and tourist arrivals data cuts

REFERENCES

1. Statistics South Africa 26 September 2023. August 2023 Tourism and Migration report.