

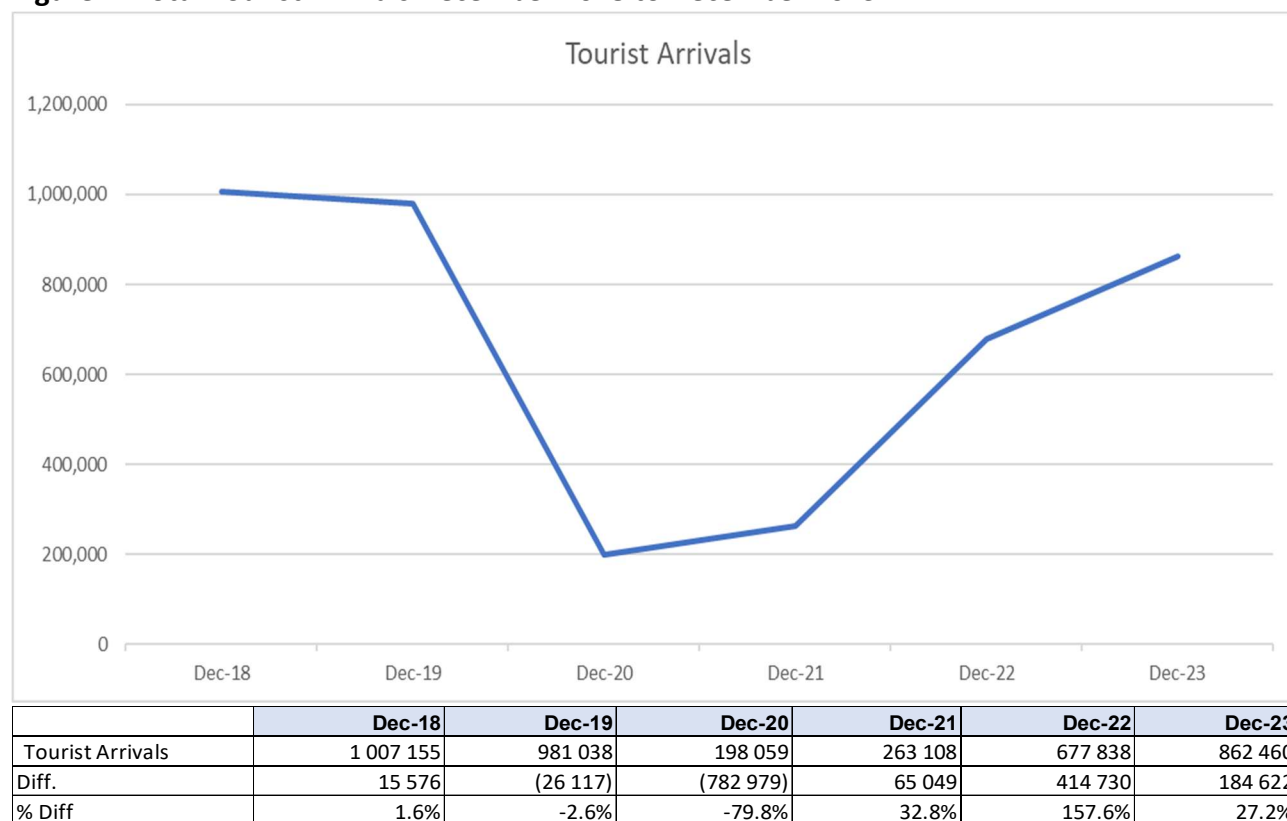
SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR DECEMBER 2023

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

TREND ANALYSIS: DECEMBER 2018 – DECEMBER 2023

A total of 862 460 tourist arrivals was recorded in December 2023, which was an increase of +27.2% (+184 622) compared to the same month in 2022. Figure 1 below indicates tourist arrivals for December 2018-December 2023 period. Tourist arrivals decreased from 1 007 155 in 2018 to 981 038 in 2019, which was a decline of -2.6% (-26 117). A further decline in tourist arrivals was reported, from 981 038 in 2019 to 198 059 in 2020 due to the impact of COVID-19 on the tourism sector. Tourist arrivals then increased from 198 059 in 2020 to 263 108 in 2021; and continued to grow by +157.6% (+414 730) in 2022 compared to 2021. During December 2023, tourist arrivals were at -12.1% level of tourist arrivals recorded in December 2019, pre-COVID period.

Figure 1: Total Tourist Arrivals December 2018 to December 2023



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

DECEMBER 2023 COMPARED TO DECEMBER 2022 BY REGION

Table 1 below shows tourist arrivals by region for December 2023 compared to the same month in 2022. During December 2023, all regions experienced a growth in tourist arrivals except for Middle East and Australasia, which declined by -13.5% and -10.3% respectively compared to December 2022. With regards to percentage growth, Central and South America had the highest increase of +89.4% (+2 893) followed by Asia (+38.7%; +4 692), Europe (+6.6%; +8 103) and North America (+2.7%; +1 000). Africa grew by +34.9% (+169 655) and this region remained the main source of tourist arrivals to the country, mainly accounting for 76.0% (+655 767) of total arrivals in December 2023.

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

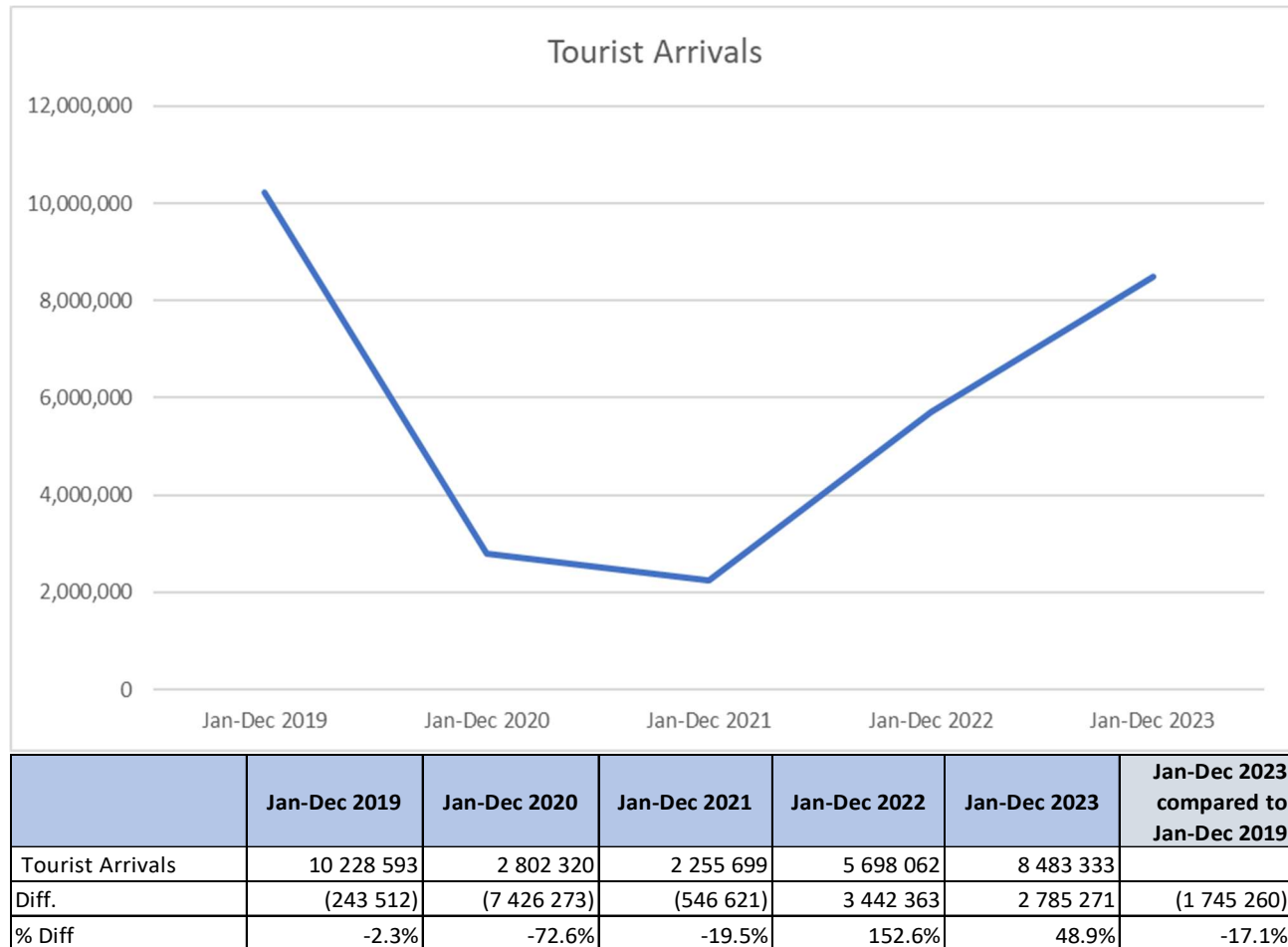
	December 2022	December 2023	Diff	% Diff
EUROPE	122 481	130 584	8 103	6.6%
NORTH AMERICA	37 517	38 517	1 000	2.7%
CENTRAL & SOUTH AMERICA	3 237	6 130	2 893	89.4%
AUSTRALASIA	12 355	11 082	-1 273	-10.3%
MIDDLE EAST	2 958	2 560	-398	-13.5%
ASIA	12 119	16 811	4 692	38.7%
TOTAL OVERSEAS	190 667	205 684	15 017	7.9%
TOTAL AFRICA	486 112	655 767	169 655	34.9%
Unspecified	1 059	1 009	-50	-4.7%
GRAND TOTAL	677 838	862 460	184 622	27.2%

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

JANUARY-DECEMBER BY REGION FOR THE PERIOD 2019 TO 2023

Annual tourist arrivals' figures by region for 2019-2023 period are indicated in figure 2 below. Total tourist arrivals went up by +48.9% (+2 785 271) during January-December 2023 compared to the same period in 2022. The international tourists documented during January-December 2023 were at 17.1% below 2019 level, which is pre-COVID period.

Figure 2: Total Tourist Arrivals: January-December 2019 to January-December 2023



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

Table 2 further indicates an increase in total tourist arrivals from overseas markets by +42.0% (+609 642). Asia (+69.1%) experienced the highest increase followed by Central & South America (+64.4%), Australasia (+62.2%), Europe (+38.2%), North America (+37.4%) and Middle East (+33.7%).

In Australasia, Australia had the highest increase in volume of 32 481 (+60.4%) followed by New Zealand (+8 059; +71.4%). In Asia, China recorded the highest growth in volume of 24 977 (+204.9%). From the Europe region, the United Kingdom had seen a major growth in volume of 73 129 (+25.9%).

In North America, USA reported the highest increase in volume (+91 792; +35.0%), while Saudi Arabia had the highest growth in volume from the Middle East region, recording 4 887 additional tourists. In Central and South America, Brazil experienced the highest increase in volume (+10 945; +74.3%) during January-December 2023.

From Africa, an increase in arrivals of 51.3% (+2 173 131) was reported, and this region remained the main source of tourist arrivals to the country; accounting for 75.6% (6 410 392) of total arrivals during January-December 2023.

In terms of volume, the increase seen from the African continent was driven by a growth in international tourists of 873 150 (+70.8%) from Zimbabwe followed by Mozambique (+396 729; +42.0%) and Eswatini (+330 187; +81.8%) as indicated in Table 3 below.

Comparing total tourist arrivals for January-December 2023 to January-December 2019 period, an overall decline of -17.1% was reported; and all regions experienced negative growth in arrivals when compared to 2019 levels, refer to Table 2.

TABLE 2: JANUARY-DECEMBER 2023 COMPARED TO JANUARY-DECEMBER 2022/2019

	January-December 2022	January-December 2023	2023 compared to 2022 Diff	2023 compared to 2022 %	January-December 2019	2023 compared to 2019 Diff	2023 compared to 2019 %
EUROPE	900 703	1 244 877	344 174	38.2%	1 556 452	-311 575	-20.0%
NORTH AMERICA	297 684	409 031	111 347	37.4%	440 271	-31 240	-7.1%
CENTRAL & SOUTH AMERICA	28 516	46 870	18 354	64.4%	120 380	-73 510	-61.1%
AUSTRALASIA	65 288	105 888	40 600	62.2%	128 153	-22 265	-17.4%
MIDDLE EAST	40 628	54 339	13 711	33.7%	55 532	-1 193	-2.1%
ASIA	117 852	199 308	81 456	69.1%	311 371	-112 063	-36.0%
TOTAL OVERSEAS	1 450 671	2 060 313	609 642	42.0%	2 612 159	-551 846	-21.1%
TOTAL AFRICA	4 237 261	6 410 392	2 173 131	51.3%	7 600 843	-1 190 451	-15.7%
Unspecified	10 130	12 628	2 498	24.7%	15,591	-2 963	-19.0%
GRAND TOTAL	5 698 062	8 483 333	2 785 271	48.9%	10 228 593	-1 745 260	-17.1%

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

Table 3 below gives the rankings of the top ten African source markets for January-December 2023 compared to January-December 2022. Most of the top ten African source markets remained in the same position except for Kenya, moving from 11th position in 2022 to 9th position in 2023, replacing Tanzania in the top ten list. And, Angola dropped from 9th position in 2022 to 10th position in 2023. All top ten countries recorded a positive growth, with Kenya recording the highest increase of +99.0% followed by Eswatini (+81.8%) and Zimbabwe (+70.8%).

Table 3: South Africa's Top 10 African Source Markets: January-December 2023 vs. January-December 2022

Country	Rank: January- December 2023	Tourist Arrivals January- December 2023	Rank: January- December 2022	Tourist Arrivals January- December 2022	% Change
Zimbabwe	1	2 106 940	1	1 233 790	70.8%
Mozambique	2	1 341 037	2	944 308	42.0%
Lesotho	3	1 163 826	3	835 921	39.2%
Eswatini	4	733 949	4	403 762	81.8%
Botswana	5	363 025	5	262 232	38.4%
Namibia	6	160 078	6	137 388	16.5%
Zambia	7	145 244	7	116 076	25.1%
Malawi	8	138 918	8	114 352	21.5%
Kenya	9	42 403	11	21 308	99.0%
Angola	10	39 265	9	32 194	22.0%

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

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-December 2023 with January-December 2022, all top 10 overseas markets grew in tourist arrivals, with Italy reporting the highest increase of +61.0%. UK remained as the main source market from overseas, with a growth of +25.8%. UK, USA, Germany, Netherlands and France remained in the top five positions respectively during both periods, And, Switzerland was replaced by Italy in the top 10 overseas source markets during January-December 2023 period.

Table 4: South Africa's Top 10 Overseas Source Markets: January-December 2023 vs. January-December 2022

Country	Rank: January-December 2023	Tourist Arrivals January-December 2023	Rank: January-December 2022	Tourist Arrivals January-December 2022	% Change
UK	1	356 160	1	283 031	25.8%
USA	2	353 975	2	262 183	35.0%
Germany	3	245 259	3	173 146	41.6%
The Netherlands	4	131 371	4	90 289	45.5%
France	5	119 974	5	76 077	57.7%
Australia	6	86 250	7	53 769	60.4%
India	7	79 774	6	55 506	43.7%
Canada	8	55 056	8	35 501	55.1%
Italy	9	52 091	11	32 357	61.0%
Belgium	10	46 348	9	34 826	33.1%

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

REFERENCES

1. Statistics South Africa 30 January 2024, December 2023 Tourism and Migration report.