

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

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

TREND ANALYSIS: NOVEMBER 2018 – NOVEMBER 2023

A total of 731 677 tourist arrivals was recorded in November 2023 which was an increase of +29.3% (+165 919) compared to the same month in 2022. Figure 1 below indicates tourist arrivals for the period November 2018 to November 2023. Tourist arrivals decreased from 875 172 in 2018 to 850 537 in 2019 which was a decrease of -2.8% (-24 635). Tourist arrivals decreased from 850 537 in 2019 to 101 096 in 2020 due to the impact of COVID-19. Tourist arrivals then increased from 101 096 in 2020 to 275 647 in 2021. Tourist arrivals increased by +105.2% (+290 111) in 2022 compared to 2021. Tourist arrivals recorded during November 2023 was at -14.0% level of tourist arrivals recorded in 2019 pre-COVID period.

Figure 1: Total Tourist Arrivals November 2018 to November 2023



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

NOVEMBER 2023 COMPARED TO NOVEMBER 2022 BY REGION

Table 1 below indicates tourist arrivals by region for November 2023 compared to the same month in 2022. All regions experienced a growth in tourist arrivals except for Middle East which declined by -19.0% during this month compared to the same month of the previous year. With regards to percentage growth, Central and South America recorded the highest increase of +92.6% (+2 620) followed by Asia (+41.4%; +5 002), North America (+23.7%; +6 332), Europe (+20.1%; +21 557) and Australasia (+12.6%; +915). Africa recorded an increase of +32.1% (+130 079) and this region remains the main source of tourist arrivals to the country accounting for 73.1% (+540 111) of total tourist arrivals recorded during November 2023.

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

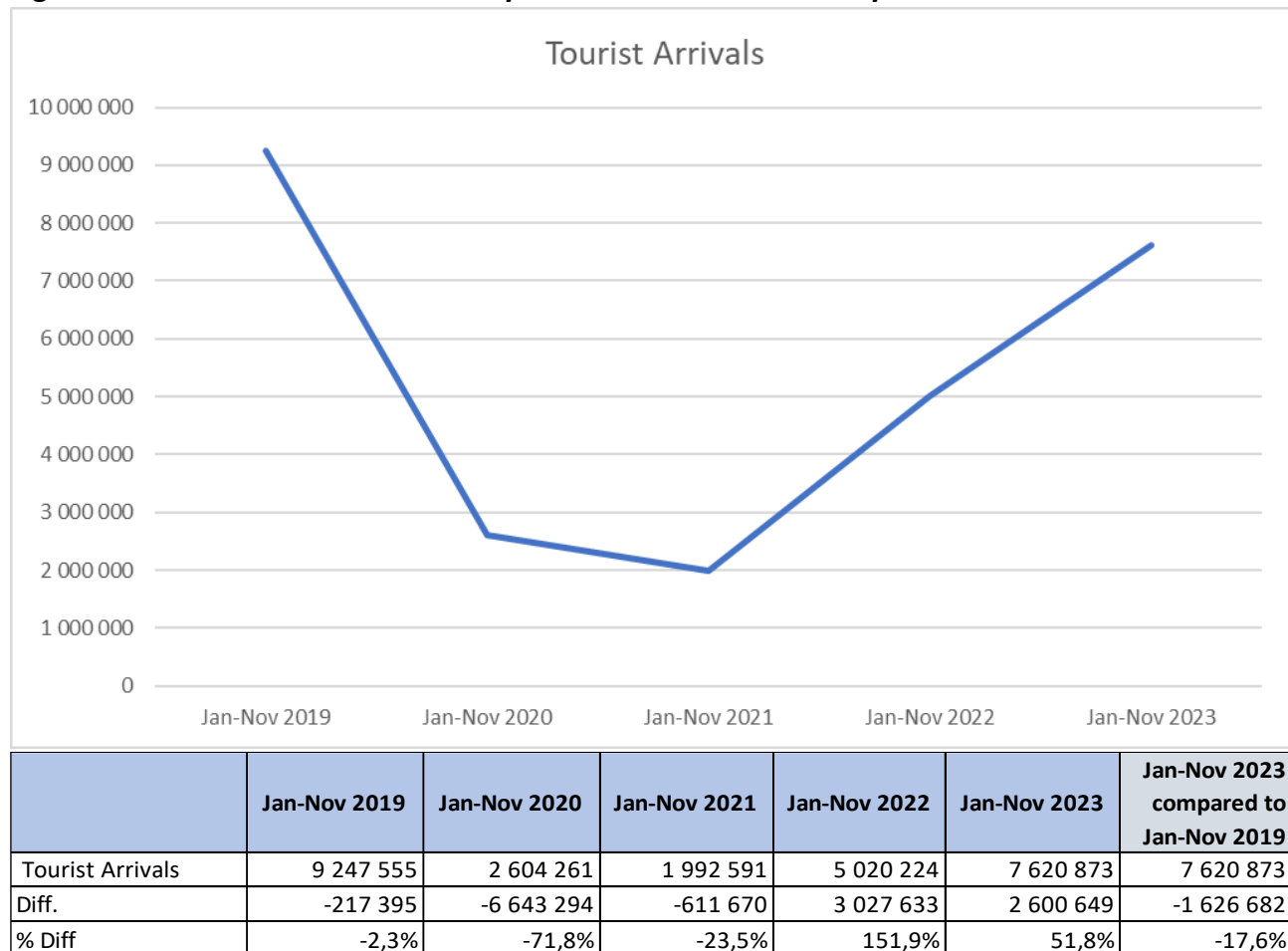
	November 2022	November 2023	Diff	% Diff
EUROPE	107 479	129 036	21 557	20.1%
NORTH AMERICA	26 690	33 022	6 332	23.7%
CENTRAL & SOUTH AMERICA	2 830	5 450	2 620	92.6%
AUSTRALASIA	7 284	8 199	915	12.6%
MIDDLE EAST	3 417	2 769	-648	-19.0%
ASIA	12 071	17 073	5 002	41.4%
TOTAL OVERSEAS	159 771	195 549	35 778	22.4%
TOTAL AFRICA	394 650	534 969	130 079	32.1%
Unspecified	10 240	1 159	62	5.7%
GRAND TOTAL	404 890	731 677	165 919	29.3%

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

JANUARY-NOVEMBER BY REGION FOR THE PERIOD 2019 TO 2023

Tourist arrivals figures by region for the period January-November 2019-2023 are indicated in figure 2 below. Total tourist arrivals went up by +51.8% (+2 600 649) for the period January-November 2023 compared the same period in 2022. Tourist arrivals recorded during January-November 2023 was at -17.6% level of tourist arrivals recorded in 2019 pre-COVID period.

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



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

Table 2 further indicates that total tourist arrivals from overseas markets increased by +47.,2% (+594 625). Australasia (+79.1%) recorded the highest increase followed by Asia (+72.6%), Central & South America (+61.2%), Europe (+43.2%), North America (+42.4%) and Middle East (+37.5%).

In Australasia, Australia recorded the highest increase in volume with an increase of 33 647 (+76.5%) followed by New Zealand (+8 171; +93.1%). In Asia, China recorded the highest increase in volume

(+23 688; +215.7%). The United Kingdom had recorded the highest increase in volume (+73 447; +30.4%) in the Europe region. In North America, USA has recorded the highest increase in volume (+90 861; +39.5%). Saudi Arabia recorded the highest increase in volume for the Middle East region with an additional +4 498 tourists compared to January-November 2022. In Central and South America, Brazil recorded the highest increase in volume (+8 396; +64.5%) for the same period under review.

Tourist arrivals from Africa increased by +53,4%% (+2 003 476) during the same period under review and this region remains the main source of tourist arrivals to the country accounting for 75.5% (5 754 625) of total tourist arrivals during January-November 2023.

In terms of volume, the increase recorded from the African continent was driven by an increase of (+828 884; +77.5%) from Zimbabwe followed by Mozambique (+367 335; +43.5%) and Lesotho (+310 001; +41.5%) as indicated in Table 3 below.

Comparing tourist arrivals for the period January-November 2023 to January-November 2019, the Middle East is the only region that showed a growth of +0.1% during January-November 2023 compared to January-November 2019, however, all regions have recorded double digits growth during the period January-November 2023 compared to the same period in 2022.

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

	January- November 2022	January- November 2023	2023 compared to 2022 Diff	2023 compared to 2022 %	January- November 2019	2023 compared to 2019 Diff	2023 compared to 2019 %
EUROPE	778 222	1 114 293	336 071	43.2%	1 393 117	-278 824	-20,0%
NORTH AMERICA	260 167	370 514	110 347	42.4%	400 837	-30 323	-7,6%
CENTRAL & SOUTH AMERICA	25 279	40 740	15 461	61.2%	107 674	-66 934	-62,2%
AUSTRALASIA	52 933	94 806	41 873	79.1%	113 911	-19 105	-16,8%
MIDDLE EAST	37 670	51 779	14 109	37.5%	51 710	69	0,1%
ASIA	105 733	182 497	76 764	72.6%	288 114	-105 617	-36,7%
TOTAL OVERSEAS	1 260 004	1 854 629	594 625	47.2%	2 355 363	-500 734	-21,3%
TOTAL AFRICA	3 662 525	5 754 625	2 003 476	53.4%	6 877 898	-1 123 273	-16,3%
Unspecified	88 624	11 619	2 548	28.1%	14 294	-2 675	-18,7%
GRAND TOTAL	3 751 149	7 620 873	2 600 649	51.8%	9 247 555	-1 626 682	-17,6%

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

Table 3 below gives the rankings of the top ten African source markets for the period January-November 2023 compared to January-November 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 and Angola moving 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 +94.2% followed by Eswatini (+77.6%) and Zimbabwe (+77.5%).

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

Country	Rank: January- November 2023	Tourist Arrivals January- November 2023	Rank: January- November 2022	Tourist Arrivals January- November 2022	% Change
Zimbabwe	1	1 898 136	1	1 069 252	77.5%
Mozambique	2	1 212 559	2	845 224	43.5%
Lesotho	3	1 057 040	3	747 039	41.5%
Eswatini	4	656 482	4	369 683	77.6%
Botswana	5	308 376	5	223 604	37.9%
Namibia	6	140 323	6	118 953	18.0%
Zambia	7	129 429	7	103 979	24.5%
Malawi	8	125 236	8	103 467	21.0%
Kenya	9	37 414	11	19 266	94.2%
Angola	10	35 811	9	28 855	24.1%

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

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-November 2023 with January-November 2022, all top 10 overseas markets recorded an increase in tourist arrivals with Australia recording the highest increase of +76.5%. Most of the top ten overseas markets moved their position except for Germany, Netherlands and France which remained in the 3rd, 4th and 5th positions respectively during the period under review. Switzerland was also replaced by Italy in the top 10 overseas sourced markets for the period January-November 2023. USA replaced UK as the main source market from overseas recording a growth of +39.5%.

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

Country	Rank: January-November 2023	Tourist Arrivals January-November 2023	Rank: January-November 2022	Tourist Arrivals January-November 2022	% Change
USA	1	320 948	2	230 087	39.5%
UK	2	315 054	1	241 607	30.4%
Germany	3	219 971	3	148 692	47.9%
Netherlands	4	117 948	4	79 489	48.4%
France	5	109 659	5	67 548	62.3%
Australia	6	77 623	7	43 976	76.5%
India	7	73 037	6	49 909	46.3%
Canada	8	49 566	9	30 080	64.8%
Italy	9	47 452	11	28 395	67.1%
Belgium	10	42 024	8	30 534	37.6%

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

REFERENCES

1. Statistics South Africa 19 December 2023, November 2023 Tourism and Migration report.