

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

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

TREND ANALYSIS: OCTOBER 2018 – OCTOBER 2023

A total of 731 108 tourist arrivals was recorded in October 2023 which was an increase of +29.2% (+165 246) compared to the same month in 2022. Figure 1 below indicates tourist arrivals for the period October 2018 to October 2023. Tourist arrivals decreased from 862 046 in 2018 to 834 275 in 2019 which was a decrease of -3.2% (-27 771). Tourist arrivals decreased from 834 275 in 2019 to 73 988 in 2020 due to the impact of COVID-19. Tourist arrivals then increased from 73 988 in 2020 to 247 833 in 2021. Tourist arrivals increased by +128.3% (+318 029) in 2022 compared to 2021. Tourist arrivals recorded during October 2023 was at -12.4% level of tourist arrivals recorded in 2019 pre-COVID period.

Figure 1: Total Tourist Arrivals October 2018 to October 2023



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

OCTOBER 2023 COMPARED TO OCTOBER 2022 BY REGION

Table 1 below indicates tourist arrivals by region for October 2023 compared to the same month in 2022. All regions experienced a growth in tourist arrivals except Middle East which declined at -9.2% 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 +68.4% (+2 023) followed by Asia (+38.0%; +4 763), Australasia (+30.8%; +1 990), North America (+24.9%; +6 709) and Europe (+23.6%; +23 392). Africa recorded an increase of +30.6% (+126 630) and this region remains the main source of tourist arrivals to the country accounting for 73.1% (+540 111) of total tourist arrivals during October 2023.

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

	OCTOBER 2022	OCTOBER 2023	Diff	% Diff
EUROPE	99 207	122 599	23 392	23.6%
NORTH AMERICA	26 922	33 631	6 709	24.9%
CENTRAL & SOUTH AMERICA	2 957	4 980	2 023	68.4%
AUSTRALASIA	6 456	8 446	1 990	30.8%
MIDDLE EAST	3 123	2 835	-288	-9.2%
ASIA	12 524	17 287	4 763	38.0%
TOTAL OVERSEAS	151 189	189 778	38 589	25.5%
TOTAL AFRICA	413 481	540 111	126 630	30.6%
Unspecified	1 192	1 219	27	2.3%
GRAND TOTAL	565 862	731 108	165 246	29.2%

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

JANUARY-OCTOBER BY REGION FOR THE PERIOD 2019 TO 2023

Tourist arrivals figures by region for the period January-October 2019-2023 are indicated in figure 2 below. Total tourist arrivals went up by +54.7% (+2 434 730) for the period January-October 2023 compared the same period in 2022. Tourist arrivals recorded during January-October 2023 was at -18.0% level of tourist arrivals recorded in 2019 pre-COVID period.

Figure 2: Total Tourist Arrivals Jan-October 2019 to Jan-October 2023



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

Table 2 further indicates that total tourist arrivals from overseas markets increased by +50.8% (+558 847). Australasia (+89.7%) recorded the highest increase followed by Asia (+76.6%), Central & South America (+57.2%), Europe (+46.9%), North America (+44.6%) and Middle East (+43.1%).

In Australasia, Australia recorded the highest increase in volume having an increase of 32 894 (+86.7%) followed by New Zealand (+8 004; +106%). In Asia, China recorded the highest increase in volume (+21 908; +231.3%). The United Kingdom had recorded the highest increase in volume (+69 616; +32.7%) in the Europe region. In North America, USA has recorded the highest increase in volume (+86 002; +41.5%). Israel recorded the highest increase in volume for the Middle East region with an additional 4 512 tourists compared to January-October 2022. In Central and South America, Brazil recorded the highest increase in volume (+6 440; +55.7%) for the same period under review.

Tourist arrivals from Africa increased by +56.6% (+1 848 006) during the same period under review and this region remains the main source of tourist arrivals to the country accounting for 75.1% (5 115 881) of total tourist arrivals during January-October 2023.

In terms of volume, the increase recorded from the African continent was driven by an increase of (+7815 56; +82.6%) from Zimbabwe followed by Mozambique (+340 803; +45.3%) and Lesotho (+305 722; +45.8%) as indicated in table 3 below.

Comparing tourist arrivals for the period January-October 2023 to January-October 2019, the Middle East is the only region that showed a growth of 3.6% during January-October 2023 compared to January-October 2019.

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

	January- October 2022	January- October 2023	2023 compared to 2022 Diff	2023 compared to 2022 %	January- October 2019	2023 compared to 2019 Diff	2023 compared to 2019 %
EUROPE	670 743	985 257	314 514	46.9%	1 228 413	-243 156	-19.8%
NORTH AMERICA	233 477	337 492	104 015	44.6%	367 417	-29 925	-8.1%
CENTRAL & SOUTH AMERICA	22 449	35 290	12 841	57.2%	97 670	-62 380	-63.9%
AUSTRALASIA	45 649	86 607	40 958	89.7%	103 718	-17 111	-16.5%
MIDDLE EAST	34 253	49 010	14 757	43.1%	47 285	1 725	3.6%
ASIA	93 662	165 424	71 762	76.6%	263 724	-98 300	-37.3%
TOTAL OVERSEAS	1 100 233	1 659 080	558 847	50.8%	2 108 227	-449 147	-21.3%
TOTAL AFRICA	3 267 875	5 115 881	1 848 006	56.6%	6 276 243	-1 056 587	-16.8%
Unspecified	78 384	103 775	25 391	32.4%	12 548	-2 088	-16.6%
GRAND TOTAL	3 346 259	5 219 656	1 873 397	56.0%	8 397 018	-1 507 822	-18.0%

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

Table 3 below gives the rankings of the top ten African source markets for the period January-October 2023 compared to January-October 2022. All 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 +94.5% followed by Zimbabwe (+82.6%) and Eswatini (+74.5%).

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

Country	Rank: January-October 2023	Tourist Arrivals January-October 2023	Rank: January-October 2022	Tourist Arrivals January-October 2022	% Change
Zimbabwe	1	1 728 054	1	946 498	82.6%
Mozambique	2	1 093 231	2	752 428	45.3%
Lesotho	3	973 058	3	667 336	45.8%
Eswatini	4	593 044	4	339 772	74.5%
Botswana	5	276 195	5	197 587	39.8%
Namibia	6	128 197	6	107 776	18.9%
Zambia	7	116 082	7	93 322	24.4%
Malawi	8	110 986	8	90 963	22.0%
Kenya	9	33 018	11	16 976	94.5%
Angola	10	32 686	9	25 717	27.1%

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

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-October 2023 with January-October 2022, all top 10 overseas markets recorded an increase in tourist arrivals with Australia recording the highest increase of +86.7%. 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 +41.5%.

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

Country	Rank: January-October 2023	Tourist Arrivals January-October 2023	Rank: January-October 2022	Tourist Arrivals January-October 2022	% Change
USA	1	293 422	2	207 420	41.5%
UK	2	282 493	1	212 877	32.7%
Germany	3	189 780	3	122 738	54.6%
The Netherlands	4	105 056	4	69 115	52.0%
France	5	98 017	5	59 314	65.3%
Australia	6	70 828	7	37 934	86.7%
India	7	65 997	6	44 539	48.2%
Canada	8	44 070	9	26 057	69.1%
Italy	9	43 762	10	25 399	72.3%
Belgium	10	37 378	8	27 141	37.7%

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

REFERENCES

1. Statistics South Africa 28 November 2023, October 2023 Tourism and Migration report.