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## **Latest tourism stats for January to March 2023 indicate a journey to a rapid recovery is underway**

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Good day, goeie more, sanibonani

Ladies and gentlemen, welcome to this exhilarating media briefing where we'll unveil the latest tourism statistics for South Africa, showcasing our country's resurgence in the international travel market!

Our data is sourced from reliable authorities such as the Department of Home Affairs, which collects information from all ports of entry on a monthly basis.

Stats SA refines this data in line with international standards and classifications to subset the tourists.

SA Tourism, the entity of the Department of Tourism, carries out a monthly survey involving departing foreigners at OR Tambo & Cape Town International Airports, and from 12 border posts with the most arrivals.

The arrivals data from StatsSA is used to weight the survey data for quantification of trip characteristics such as length of stay, spend, purpose of visit etc.

This enables us to estimate international tourism's contribution & value from a demand-side. In summary, the arrivals data we present is the same with Stats SA data.

The SA Tourism entity, under the Department of Tourism's departure survey stands as the only official survey in the country capable of measuring these statistics.

This departure survey has undergone the Stats SA process of quality certification, the South African Statistical Quality Assessment Framework (SASQAF).

The pandemic undoubtedly left a dent in the tourism industry, but we're back, stronger than ever, and geared to catapult our inbound tourism numbers beyond pre-COVID levels.

Achieving this monumental goal requires a united front: government, private sector, and all tourism stakeholders joining forces to redefine the travel experience in our beloved country.

As the world reawakens, tourists are flocking back to South Africa, enticed by our unparalleled natural beauty and the warmth of our people.

We are broadcasting a clear message: South Africa is open for tourism, welcoming business, and eagerly awaiting travellers from across Africa and the globe.

2022 heralded a resurgence, with nearly 5.8 million visitors gracing our shores, including 4 million from Africa. This stunning 152.6% increase from 2021 is just the beginning.

We're not quite at the 10 million arrivals of 2019, but rest assured, our tireless collaboration with the private sector and Africa will take us there and beyond in no time.

### **Latest Statistics: Quarter 1: January to March 2023**

Now, for the big reveal: international arrivals to South Africa for Q1 (January to March 2023).

An impressive 2.1 million visitors, a 102.5% increase compared to the same period in 2022. While still 21.5% lower than 2019 levels, we're gaining ground rapidly.

The African continent led the way again with 1.6 million arrivals, followed by Europe's 387 000 and the Americas' 104 000 visitors.

The world is rediscovering South Africa, and together, we'll not only reach, but surpass pre-COVID numbers.

Our determination and unity will light the way to a brighter future for South African tourism.

From a domestic perspective, we have seen an incredible resilience with Q1 2023 performance surpassing pre-pandemic levels and those of Q1 2022.

### **Foreign Spend and Tourism Impact**

In the first quarter of 2023, foreign direct spend soared to an astounding R25.3 billion, marking a 143.9% increase compared to Q1 of 2022.

Tourists from Europe contributed the most spend of R10,8 billion, followed by Africa with a collective spend of R9,3 billion.

The overall foreign spend figure for quarter 1 this year is tantalizingly close to the R25.6 billion spent between January and March 2019 and showcases the industry's unwavering resilience.

We witnessed remarkable growth in spending from our Zimbabwean and Mozambican visitors, with Q1 2023 figures reaching R4.4 billion (50% above 2019 performance) and R1.1 billion (12% above 2019 performance) respectively.

However, spend from UK visitors dipped by 27% to R3.2 billion, while visitors from the USA contributed a robust R2.6 billion, surging 28% above 2019 performance.

A significant driver of these remarkable figures is as a result of lifting of travel restrictions and affordability.

After two years of restrictions and confinement, travellers are eager to explore wide-open spaces, and South Africa offers these in abundance.

### **Top Source Markets and Travel Trends**

In Q1 (January to March 2023, Zimbabwe maintained its reign as South Africa's top source market, a trend consistent since 2019.

Over 500,000 Zimbabwean travellers journeyed to South Africa between January and March 2023, compared to 643 000 in the same period in 2019 and 173 000 in 2022.

Mozambique followed as the second-largest source market, boasting over 354 000 arrivals between January and March 2023.

Next in line were Lesotho and Eswatini, taking the third and fourth spots, respectively.

The United Kingdom claimed the fifth position, with more than 118 000 arrivals in South Africa between January and March 2023, a decrease from 135 000 in 2019.

Germany, USA, Botswana, Namibia, and the Netherlands round out the top 10 source markets for travellers to our country.

Across the board, we've seen a 102% surge in total arrivals from 2022 to 2023 during Q1, reflecting South Africa's attractiveness to international visitors.

The number of bed nights has also recovered in Q1 2023 but not to the Q1 2019 levels.

Total bed nights amounted to 28.4 million in Q1 of 2023, this being a 3% decline over Q1 2019 but a remarkable 124% increase over Q1 2022.

Another promising trend is the 11% increase in the average length of stay in Q1 2023 compared to 2022.

Visitors are spending more time exploring South Africa, with the average stay reaching 13 days in Q1 2023, surpassing the 11-day average in 2019.

These numbers showcase South Africa's undeniable magnetism and the vitality of our tourism industry as we continue to welcome travellers from around the globe with open arms.

### **Geographical Spread and Travel Destinations**

South Africa offers a diverse range of captivating destinations for travellers, with Gauteng taking the lead in international arrivals, spend and bed nights.

International visitors tend to spend most of their nights in the Western Cape, followed by Gauteng. The Eastern Cape, Northern Cape, KZN, and the North West also draw tourists to their unique charms.

While smaller provinces currently see fewer visitors, we encourage tourists to explore these hidden gems, as they too boast unparalleled beauty and value.

South Africa's diverse landscape promises a treasure trove of unforgettable experiences for travellers seeking adventure and discovery across our magnificent country.

### **South Africa vs. Other Long-Haul Destinations and Global Trends**

South Africa's tourism industry has demonstrated remarkable resilience and growth, outshining other popular destinations like China, France, Italy, and Brazil.

Despite a 44.3% drop in arrivals in 2022 compared to 2019, our nation achieved an outstanding 141.9% increase compared to 2021.

The global landscape has posed challenges, including inflation, rising energy prices, and the Russia-Ukraine conflict, leading to economic constraints worldwide.

As a result, we must market ourselves more aggressively and exploit all avenues to expand our reach in major source markets like Africa, Europe, China, the USA, the UK, and India.

South Africa offers travellers unparalleled beauty and affordability, making it an irresistible destination.

Embracing travellers from every region is essential, with a particular focus on Africa. Destination marketing trends emphasize eco-friendly activities and accommodations, as well as inclusivity for the LGBTQI+ community.

Collaboration with local businesses, cultural organizations, and community groups is key to creating accessible and diverse tourism experiences.

### **Air Access and New Routes**

Air capacity has risen since last year, with a 56% increase in Q1 2023 compared to the same quarter in 2022. In 2023, we reached 1.8 million seats, and South Africa welcomed around 23 new routes.

New direct flights, such as Cape Town to New York and Washington by United Airlines, Air China's resumed direct flight to South Africa.

The upcoming LATAM flight from Brazil to OR Tambo International Airport, contribute to our nation's appeal. South African Airways' expansion into various African markets further boosts our attractiveness.

In terms of aviation supply, seats from the Americas doubled in Q1 2023, surpassing 2019 levels.

The Middle East has fully recovered in outbound travel, and Europe has introduced 5 new airlines and routes to South Africa.

### **Domestic Travel**

January-March of 2023 saw domestic overnight trips exceed pre-pandemic levels as well as 2022 levels by 41,0%.

Overnight domestic spend was also up 24,4% compared to Q1 2022.

Average overnight spend was down 11,7% signifying that South Africans took more frequent trips and spent less.

The total number of nights spent away from home reached 27,9 million and this was a 32,9% increase over the same period in 2022.

The average length of stay per trip fell by 5,7% highlighting the global trend that travellers now opt to take shorter and more frequent trips than before.

Domestic holiday trips from January to March 2023 were up 40,5% compared to 2022 to reach 2,4 million. These holiday trips represented a 27,0% share of total overnight trips.

The expenditure from holiday trips in Q1 of 2023 was R9,5 billion compared to R7.9billion in 2022.

There was a 12,3% increase in MICE trips (Meetings, Incentives, Conferences & Exhibitions) taken during January and March 2023.

For the 2022/23 Financial Year, the South African National Conventions Bureau's Sales team has won 40 of the bids submitted for the 2022/23 financial year.

These secured business pieces will contribute R338m to South Africa's economy between 2022 -2025 and attract 16 505 international and regional delegates.

In addition, the SA National Convention Bureau invested R19.2m in bid submissions through its bid support programme to attract business events linked with the National Government's development priorities.

The secured conferences will also contribute to the regional spread of business events.

The secured MIC events include the International Congress of African Phytomedicine Scientific Society, the Southern African Neurological Association Conference and the Global Association of the Exhibition Industry (UFI) Global Congress.

The various MICE events will be hosted in Johannesburg, Tshwane, Hammanskraal, Cape Town, Bloemfontein, Durban, Mokgopong, Muldersdrift and Pietermaritzburg.

Returning to domestic numbers, day trips grew by 26,9% to reach 44,7 million in quarter 1 of 2023.

Domestic travellers travel mostly for visiting friends and relatives, followed by holiday.

The top three provinces visited were Gauteng, Limpopo, and Eastern Cape.

In conclusion, ladies and gentlemen, our numbers are moving in the right direction.

With focused action on improving visa turnaround times, increasing air access, ensuring safety, and aggressive marketing, we are determined to surpass pre-COVID levels.

Working together with all stakeholders, we aim to boost tourism's contribution to the economy and job creation.

Thank you all for your time and support and coverage of the Africa Travel Indaba.

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