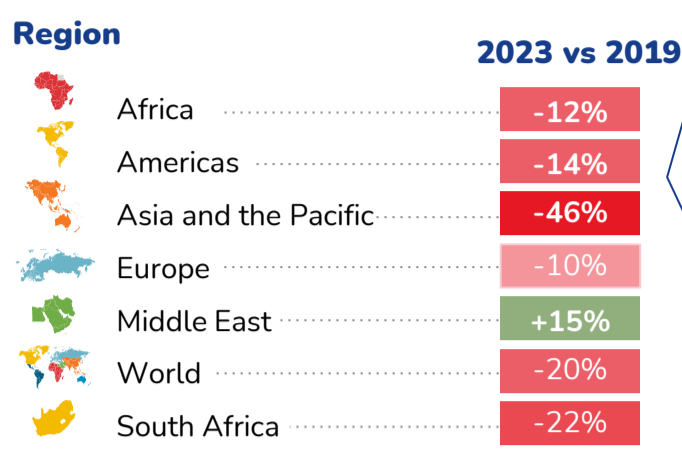




INTERNATIONAL TOURISM 2023 JAN – JUN PERFORMANCE

Jan to Mar 2023 – 2023 performance vs. 2019 levels

Global Performance



Insights

- In the first quarter of 2023, international arrivals surged to 80% of pre-pandemic levels, with approximately 235 million tourists traveling internationally. This figure represents more than double the number of tourists in the same period in 2022.
- The UNWTO advises that the industry stay vigilant and attentive to various challenges, including geopolitical instability, staffing shortages, and the potential effects of the cost-of-living crisis on tourism.

(Source UNWTO – no data is available post March 2023 from the UNWTO)

South Africa Estimated Economic Performance - Annual

South Africa key data



Total contribution of travel and tourism to GDP



Total contribution of travel and tourism to employment

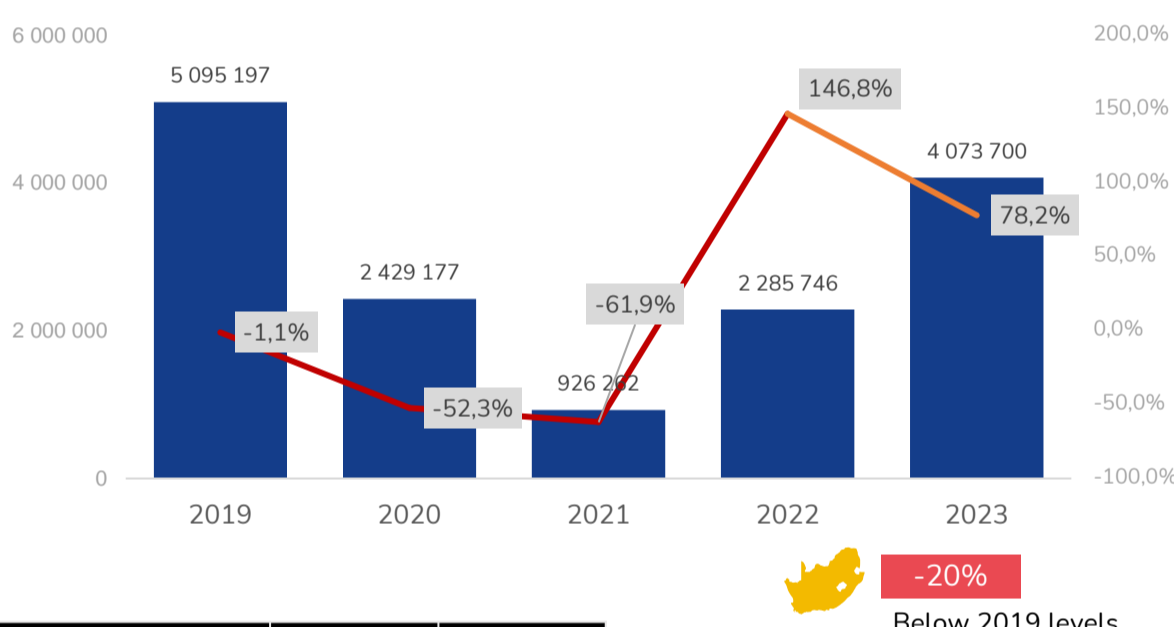
Year	Total contribution of travel and tourism to GDP	Total contribution of travel and tourism to employment
2019 Revised	7.8% of Total Economy ZAR 513.1 BN \$ 31.38 BN	1.51MN 9.2% of total jobs
2022	6.3% of Total Economy ZAR 421.7BN \$ 25,8BN Change vs. 19: -17.8% ▼ Economy change: +2.3% ▲	1.31MN 8.4% of total jobs Change vs. 19: -13.1% ▼
2023 (Forecast)	6.8% of Total Economy ZAR 458.9BN \$ 28.0BN Change vs. 19: -10.6% ▼	1.38MN 8.7% of total jobs Change vs. 19: -8.3% ▼

According to the WTTC forecast, South Africa's travel and tourism GDP contribution in 2023 is expected to be 6.8% of the total contribution to travel and tourism to GDP, performing 10.6% below the levels observed in 2019. Moreover, it is projected that the overall employment contribution of the travel and tourism sector will account for 8.7% of jobs, which is 8.3% below the levels seen in 2019.

(Source WTTC – 2019 revised data. Most recent update 2023)

International Arrivals to South Africa (Jan to Jun)

Arrivals by year



-20%
Below 2019 levels

Country	2019	2023
Africa Land	3 670 973	2 967 595
Europe	740 961	594 388
Americas	272 629	220 451
AAME	240 042	168 975
Africa Air	163 279	115 899

Country	2019	2023
Zimbabwe	1 154 486	1 008 769
Mozambique	681 530	657 830
Lesotho	827 127	609 543
Eswatini	439 663	333 644
UK	220 830	179 693
USA	183 134	174 403
Botswana	309 560	157 807
Germany	149 531	122 797
Namibia	92 093	76 004
Malawi	91 324	58 241

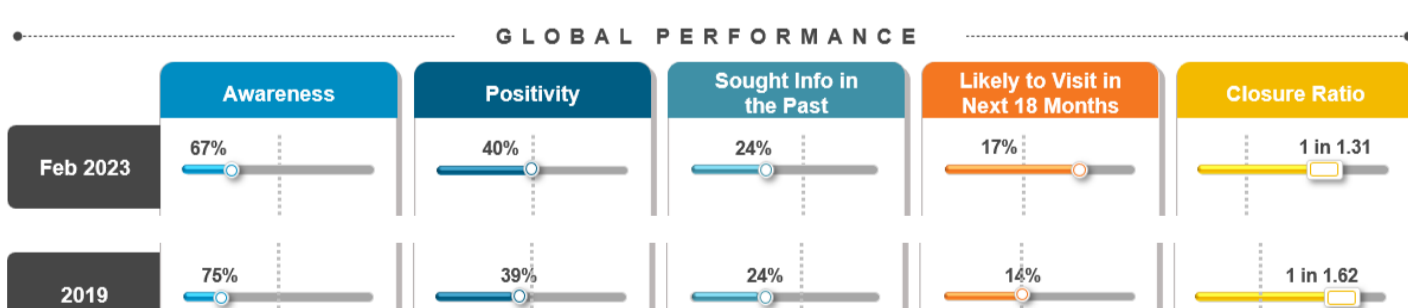
(Source StatsSA – Jan to Jun arrivals)

Insights

- For the initial half of 2023, tourist arrivals amounted to 4.1 million, whereas the figure for the corresponding period in 2019 was 5.1 million. This indicates a 20% decline in performance compared to 2019. However, there was a substantial increase of 78.2% in tourist arrivals from 2022 to 2023.
- Among the regions contributing to the arrivals, African land markets constituted the largest share, followed by Europe, the Americas, Asia Australasia, the Middle East, and Africa Air.
- In 2023, Zimbabwe holds the leading position as the top market in terms of tourist arrivals, with Mozambique ranking second and Lesotho coming in third. Interestingly, in 2019, Lesotho had traditionally held the number two position, but in 2023 it dropped to the third spot, with Mozambique taking its place as the second-largest market. As for overseas markets, the UK and the USA are top, followed by Germany.

South Africa Brand Performance

GLOBAL PERFORMANCE



Insights

- In February 2023, the positivity rate dropped to 67%, which decreased from the 75% recorded in 2019. Despite this decline, the positivity rates have remained stable, and there are positive indicators, such as an increase in the intention to visit within the next 18 months and an improvement in the closure ratio. The decrease in awareness is a prevailing trend established in the Brand Tracker survey observed in most markets following the COVID-19 pandemic.

(Source Brand Tracker)

Key motivators to drive tourism in South Africa



- The top five motivators for travel to South Africa are: Beautiful scenery, to experience a different culture, to go on safari, visit friends and family and good value for money.

(Source Brand Tracker) – Score out of 7

Disclaimer: The AI unit makes every effort to publish reports that are error-free. However, with the large number of complex records that are analysed, we cannot guarantee that all reports are totally free of errors. All errors that are detected are immediately corrected.



SOUTH AFRICAN TOURISM