

Inspiring new ways

TOURISM

PERFORMANCE 2ND QUARTER REPORT

April-June 2023

Aklillan

DOA ACSO Neesha Pillay 29 Sep 23

DEFINITIONS



- Visitor Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.
- Same day visitor Any person who visits a place without staying the night.
- **Tourist** A visitor who stays at least one night in the place visited.
- International Tourist An international visitor who stays at least one night in collective or private accommodation in the country visited.



- **Domestic Visitor** A visitor whose country of residence is the country visited. They may be nationals of this country or foreign nationals.
- **Domestic Tourist** A resident of the country of reference who spends at least one night in the place visited outside of his/her usual environment.
- Overnight Trip A journey undertaken by one or more members of the household for at least one night away from home, where the persons travelling did not receive any remuneration (did not make any profit) at the destination. For a trip to be complete, the person must return to his/her place of residence.
- Usual Environment To be outside the usual environment the person should travel more than 40 kilometers from his/her place of residence (one-way) AND the place should NOT be visited more than once a week. This includes their place of work and place of study. Leisure and recreational trips are included irrespective of frequency.



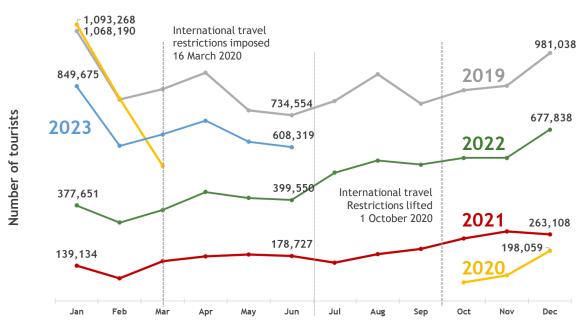
IMPACT OF COVID-19 ON THE SURVEY



Due to the Covid-19 pandemic, surveying international tourists at airports and land border posts became impossible and the survey stopped at the end of March 2020. Surveying land border posts became possible only in November 2020 but airports remained impossible to survey till mid-August 2021. Hence, land border post data was imputed for October 2020, and for airports, October-December 2020 data was imputed. Imputation is the process of replacing missing data with substituted values whereby projections of missing data are based on an existing mathematical relationship present in the available data set. Hence, the process was based on corresponding and comparable retrospective values for which full data sets were present.

Since interviewing at the airports became possible only in mid-August 2021, data for Q1 2021 was obtained by readjusting Q1 2020 data for visit purposes recorded by StatsSA in Q1 2021. The output was then weighted based on the number of arrivals from different markets. The assumption made, was that tourists visiting the country for similar purposes are likely to visit similar attractions and, on average, stay for the same duration. For Q2 of 2021, the same data processing was conducted as had been done for Q1 2021 but using Q2 2019 data as there had been no international tourist arrivals in Q2 2020. Interviewing at the Oliver Tambo International Airport resumed in mid-August 2021, and in the Cape Town International Airport in September 2021. Hence, Q3 2021 numbers are based solely on data collected from mid-August till September end and weighted to cater for July and early August. From Q4 2021 onwards, the numbers shown are based solely on survey data.

International Tourists Arrivals in SA, 2019-2023¹



¹ Statistical Release P0351: Tourism and Migration Statistics SA, July 2023.





INTERNATIONAL TOURIST ARRIVALS



This report was prepared by South African Tourism's Analytics and Insights Unit and is based on the South African Tourism's Departure Survey which has been deployed by SA Tourism since 2001 to monitor and measure international tourist behaviour as they leave South Africa. The survey aims to track tourist travel behaviours, expenditures, accommodation usage, experiences, as well as satisfaction with South Africa as a tourism destination. The survey first began as a point-in-time survey conducted in winter and summer.



The survey is conducted monthly and covers SA's two main international airports (Oliver Tambo and Cape Town) as well as the 12 main land border posts (Grobler's Bridge, Maseru Bridge, Oshoek, Golela, Kopfontein, Pioneer Gate, Lebombo, Beitbridge, Vioolsdrift, Nakop, Ficksburg, Ramatlabama), the latter being the largest point of entry into South Africa by foreign nationals. Durban's King Shaka International Airport as well as all sea ports are currently excluded from the survey as they receive less than 5% and 1% of international tourist arrivals respectively.

The survey is based on a random stratified sampling framework of n=3,800 per month for both of the airports and n=1,000 per month for all land border posts. The sample framework is derived from Statistics South Africa (StatsSA) tourist arrivals data and the survey results are weighted back according to the same tourist arrival data. The margins of error for the airport and land border post monthly samples are 1.6% and 3.1% respectively, both at a 95% confidence level. As such, the survey accurately represents tourists arriving in South Africa as well as their behaviours and opinions. Arrival numbers given are actual tourist arrivals from StatsSA and not tourist arrivals as calculated by the survey. When crossed with other survey variables, tourist arrival numbers are survey-based.



South African Tourism's Domestic Survey is conducted through in-home face-to-face interviews - the most feasible interview approach for this type of study, in order to ensure high data quality. The sample is designed as a multi-stage, stratified sample of n=1,300 per month. The sampling framework is built from geographic strata based on enumerator areas (EAs) used as primary sampling units (PSUs), and households, used as the secondary sampling units (SSUs). In each EA drawn, four households are systematically selected with an equal selection probability. However, the EAs are disproportionally allocated to the main strata in order to ensure sufficient representation of domestic tourism from smaller provinces. The sample design ensures all stratification variables such as province, metro, urban, rural, race, age, and gender are covered. The domestic survey has a margin of error of 2.7% at a confidence level of 95% for the monthly sample. Results are weighted based on Stats SA's mid-year population estimates of SA residents aged 18 and above, and as such, the sample is representative of SA's adult population.

Due to the Covid-19 pandemic, surveying in-home face-to-face became impossible and the survey was halted at the end of February 2020. The survey was renewed in July 2020 (for March travel). Since then, quotas have been achieved in full, although this has not been without difficulty. Interviewers received special training on how to overcome respondent fears; laminated cards were produced and sanitized in front of the respondents; interviews were conducted outside the house gates; interviewers were instructed to keep face masks and shields on at all-times except for a few seconds of introduction and identification; and lastly, interviewers used only private transport.





ADDITIONAL SOURCES USED IN THIS REPORT:



- Statistical Release P0351: Tourism and Migration Statistics SA, July 2023.
- Statistical Releases P0441: Gross Domestic Product, March 2021 March 2023.
- Trading Economics, https://tradingeconomics.com/south-africa/gdp.
- 'South African Economy Expands by 0.4%' Statistics SA, 6th June 2023.
- Schultz, C. (2023): 'Loadshedding Continues to Hurt Sector', Tourism Update, 27th June 2023.
- Statistical Release P0441: Gross Domestic Product, 1st Quarter 2023, Statistics SA, 6th June 2023.



DISCLAIMER



SA Tourism's Analytics and Insights Unit makes every effort to publish reports that are error-free. However, with the large number of complex records that are analyzed, we cannot guarantee that all reports are totally free of error. All errors that are detected are immediately corrected and the latest version of the report is always made available on www.southafrica.net/research.

To access this report online please visit the research section on the South Africa Tourism website at www.southafrica.net/research or for more information e-mail: research@southafrica.net.

NOTE TO THE READER — TIME COMPARISONS



The Covid-19 has dealt the tourism industry in South Africa as well as around the world a harsh blow ever since it began in March 2020. Still to this day, the tourism industry has yet to fully recover from the pandemic and remains largely affected by it. Being given tourism's performance is still at low levels, progress made in 2023 cannot be evaluated against the previous year, since the latter was also harshly impacted by Covid-19. To put it simply, comparing 2023 results to 2022 would paint a much rosier picture than reality. Consequently, the view taken in this report in the international tourism section, as in all international reports by leading tourism bodies (UNWTO, IATA), is to compare 2023 performance to that of 2019 - a year unaffected by Covid-19. This comparison shows whether tourism has returned to its pre-Covid-19 levels or not. With this in mind, all of South Africa's international tourism performance KPIs are calculated over 2019, except for geographic spread and SA's domestic tourism performance KPI's which are calculated over Q2 2022 (the former due to a methodology change in 2020). Further, South Africa's GDP growth rate is calculated over the previous quarter as per the source for this (Statistics SA). Lastly, in first quarter reports, although Q1 2020 was unaffected by Covid-19, results are compared to Q1 2019 to maintain consistency across quarterly reports.

Nonetheless, in order to show what progress has been made since Covid-19, YOY growth rates are also provided for all periods (Q2 2018 - Q2 2023). In the narrative, where Q2 2023 figures are compared to Q2 2021 & Q2 2022's results rather than to Q2 2019's, the commentary is in italics. In charts, comparisons to Q2 2022 are part of the YOY line graph while comparisons to Q2 2019 are plotted separately and clearly marked as such.



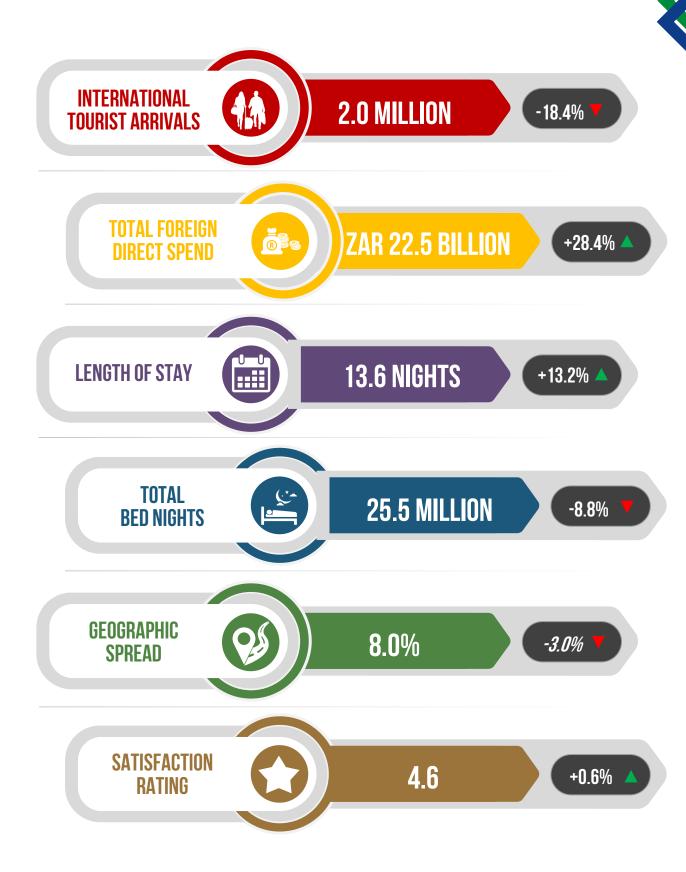
EXECUTIVE SUMMARY

- International tourist arrivals for Q2 2023 amounted to 2.0 million. Arrivals are now -18.4% vs. Q2 2019. This is slightly better than Q1 2023's -21.5% vs. Q1 2019 and is more pronounced recovery than Q2 2022's and Q2 2021's -48.2% and -77.4% vs. Q2 2019 respectively. On a monthly basis, international tourist arrivals for April-June 2023 are a similar -18.2% compared to April-June 2019.
- Africa Land tourists amounted to 1.5 million as they did in Q1 2023 and continue to form the bulk of all arrivals in SA (75.6%). This is even more so than in 2022 when they amounted to 71.0%. Africa Land recovery (-16.8% vs. Q2 2019) is slightly better than that of Africa (-17.2%) and is also the lowest negative growth rate out of all regions, outdone only by the Middle East's positive +4.4% vs. Q2 2019.
- Africa Air arrivals amounted to 56.7 thousand, representing a 2.9% share. Unlike Q1 2023 when the region's recovery was slower than the previous quarter (-32.1% in Q1 2023 vs. -27.7% in Q4 2022), this quarter the recovery is more upbeat and stands at -25.3% vs. Q2 2019. This is most likely due to the region's disproportionately high share of business travellers and their rebound once the holiday season is over.
- European arrivals in Q2 2023 amounted to 207.1 thousand, accounting for only 10.6% of arrivals (vs. 18.3% in Q1 2023). However, a similar pattern also existed in Q2 2019 & Q2 2022 (11.4% &13.2% respectively). This is probably due to their preference to visit SA in the summer. This second quarter, Europe's recovery is -24.2% and lower than the average -18.4% vs. Q2 2019.
- Travel from the Americas amounted to 115.5 thousand, reflecting a -16.6% decline compared to Q2 2019, and an improvement on Q1's -21.8% over Q1 2019. This is the 2nd best rate after the Middle East's +4.4% (vs. Q2 2019). The Americas accounted for a 5.9% share – basically the same as in 2022 & Q2 2019.

- This 2nd quarter of 2023, Asia arrivals have begun to truly recover amounting to 55.9 thousand, a 2.9% share, and only -32.6% down on Q2 2019. This is an improvement since Q1 2023's -47.4% vs. Q1 2019, but is still the lowest recovery rate out of all the regions. This is also less than their Q2 2019 share (3.5%).
- Australasian tourist arrivals amounted to 26.3 thousand and continue to show tremendous recovery with the third best regional recovery rate (-18.5% vs. Q2 2019). Their share this quarter (1.3%) is the same as in Q2 2019 and improves on their 2022's 1.1% & Q1 2023's 1.2%.
- Middle East arrivals amounted to 11.4 thousand and a 0.6% share. This is more than a total recovery over Q2 2019 when arrivals were 10.9 (0.5% share). The region's +4.4% over Q2 2019 is the highest and the only positive recovery rate. Similarly, in Q1 2023, arrivals from the Middle East also recorded the highest regional recovery rate.
- The second quarter in 2023 continues the turnaround in travellers' behaviour evidenced first in Q2 2022. VFR and holiday are even more dominant, surpassing their combined Q2 2019 levels (70.4% vs. 59.8%). The driving force behind this is VFR's extremely high share of 56.9% vs. 41.4% in Q2 2019, whereas holiday remains below Q2 2019 levels (13.5% vs. 18.4% in Q2 2019).
- Foreign spend continues to show significant recovery as was also the case in Q1 2023 & Q4 2022. Spend by foreign tourists equals ZAR 22.5 billion this quarter and is showing a marked positive increase of +28.4% over Q2 2019 results.
- Length of stay continues to surpass 2019 levels and equals 13.6 nights. This is +13.2% growth over Q2 2019 but is lower than Q1 2023's +23.3% over Q1 2019.
- Tourist satisfaction continues to improve for the 3rd time in a row. It now stands at 4.6 out of a maximum score of 5.

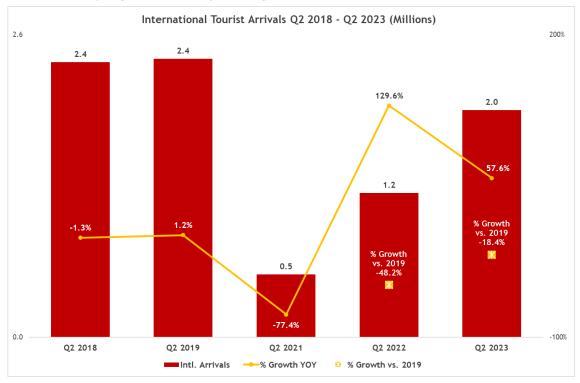


KEY PERFORMANCE INDICATORS





International tourist arrivals for Q2 2023 amounted to 2.0 million. Arrivals are now -18.4% vs. Q2 2019. This is slightly better than Q1 2023's -21.5% vs. Q1 2019 and is a much more pronounced recovery than Q2 2022's & Q2 2021's -48.2% & -77.4% vs. Q2 2019 respectively. This second quarter, Africa is more than ever, the largest source continent (78.5% vs. 74.4% in 2022) due to Europe's much diluted second place (10.6% vs. 15.8% in 2022). The Middle East is the only region to show a positive growth rate (+4.4% vs. Q2 2019).



International Tourist Arrivals Q2 2023 (Actual, Share & Q2 2023 vs. Q2 2019 Growth)

Middle East **Europe** 11,422 207,092 +4.4% up -24.2% down -Arrivals Arrivals from Q2 2019 from Q2 2019 0.6% 10.6% **Asia** 55,925 -32.6% down _ Arrivals from Q2 2019 2.9% **Americas Africa** Australasia 115,461 1,532,460 26,259 -17.2% down -16.6% down -18.5% down _ Arrivals Arrivals Arrivals from Q2 2019 from Q2 2019 from Q2 2019 5.9% 78.5% 1.3%

AFRICA RECOVERY — PRIORITY MARKETS

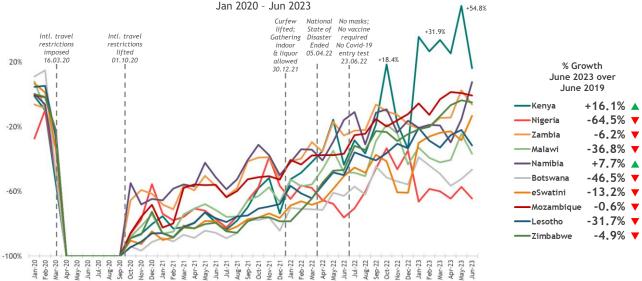
-17.0%

monthly average Apr-Jun 23 vs. Apr-Jun 19

For the three months of April, May, June, Africa priority markets' average monthly recovery rate is -17.0% vs. 2019. This is similar to SA's overall quarterly recovery rate of -18.4% since Africa priority markets make up around 76.3% of SA arrivals. This second quarter, Kenya is showing positive growth once more but is not the only one to do so in June, and her +16.1% is joined by Namibia's +7.7%. Further, May 2023 has added another exceptional peak to Kenya's amazing track record - a whooping +54.8% (other peaks in October 2022 +18.4%, and in January-March 2023 an average +31.9%).

Declines continue to be led by the same countries as before, namely, Nigeria, Botswana, and Malawi. These markets have consistently shown the highest decline rates (-62.0, -51.8%, & -33.9% respectively for April-June on average). Missing from the top decline list this quarter as well, is eSwatini, which has shown incredible recovery in Q1 & Q2 2023 (-26.6% in Jan-Mar & -21.5% in Apr-Jun 2023). Share changes have not been significant, and pre-Covid-19 rankings have been kept in place with Zimbabwe, Lesotho, Mozambique, & eSwatini leading, accounting for 85.9% of Africa priority arrivals.

Recovery of Africa Tourist Arrivals vs. Same Month in 2019¹



Pre-Covid Share

2.1% 2.5% 2.7%
9.1%
47.0%
17.9%
21.5%
31.1%

Share of Priority Africa Tourist Arrivals by Country Prior vs. Post Covid-19¹

Pre-Covid	Country		Jun	-23
Share			Share	Growth
0.4%	Kenya		0.6%	16.1%
0.7%	Nigeria		0.3%	-64.5%
2.1%	Zambia		2.5%	-6.2%
2.5%	Malawi		2.2%	-36.8%
2.7%	Namibia		2.8%	7.7%
9.1%	Botswana		5.7%	-46.5%
12.0%	eSwatini		12.0%	-13.2%
17.9%	Mozambique		22.1%	-0.6%
21.5%	Lesotho		18.7%	-31.7%
31.1%	Zimbabwe		33.2%	-4.9%

¹ Statistical Release P0351: Tourism and Migration Statistics SA, July 2023.

Jun-23 Share
2.5% 2.2% 2.8% 5.7%
12.0%
22.1%
18.7%
33.2%

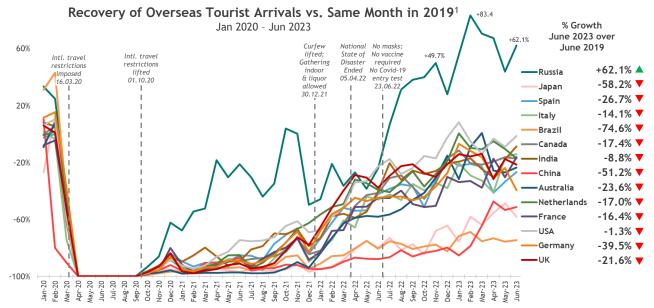
OVERSEAS RECOVERY — PRIORITY MARKETS

-22.2%

monthly average Apr-Jun 23 vs. Apr-Jun 19

This second quarter, overseas priority markets' recovery is slightly slower than that of Africa priority (-22.2% vs. -17.0% over Apr-Jun 2019) — contradictory to the previous quarter. Overseas recovery is still clearly led by Russia's phenomenal growth rates with June 2023 adding another incredible peak to the Russian portfolio (+62.1% vs. June 2019). The USA continues to show a consistent return to 2019 levels with this quarter averaging -4.5% per month. India is the only other country to show a significantly low decline in June (-8.8%).

Brazil has yet to recover and has been showing decline rates of around -80% since February 2022 (-77.6% monthly average for Feb. 2022-Jun 2023). It has been overtaken by both China and Japan which are making clear strides towards a recovery (-50.7% and -54.1% for Apr-Jun vs. same months in 2019). Germany is the only other country to show a decline rate which is far removed from the average -22.2%. Germany's -31.4% monthly average this quarter stand in sharp contrast with her -11.7% average in Q1 2023 and is probably explained by South Africa's winter.



Share of Priority Overseas Tourist Arrivals by Country Prior vs. Post Covid-191

Silare of Frior	
Pre-Covid Share	
2.8%	
3.2% 3.4% 4.0%	
4.3%	
4.8%	
7.1%	
9.1%	
15.4%	
18.8%	
23.2%	

Pre-Covid	Country		Jun	-23
Share			Share	Growth
0.9%	Russia		1.5%	62.1%
1.3%	Japan		1.1%	-58.2%
1.6%	Spain		2.1%	-26.7%
2.8%	Italy		3.0%	-14.1%
3.2%	Brazil		1.5%	-74.6%
3.4%	Canada		3.1%	-17.4%
4.0%	India		8.7%	-8.8%
4.3%	China		3.4%	-51.2%
4.8%	Australia		7.1%	-23.6%
7.1%	Netherlands		4.1%	-17.0%
9.1%	France		5.6%	-16.4%
15.4%	USA		36.9%	-1.3%
18.8%	Germany		6.0%	-39.5%
23.2%	UK		15.8%	-21.6%

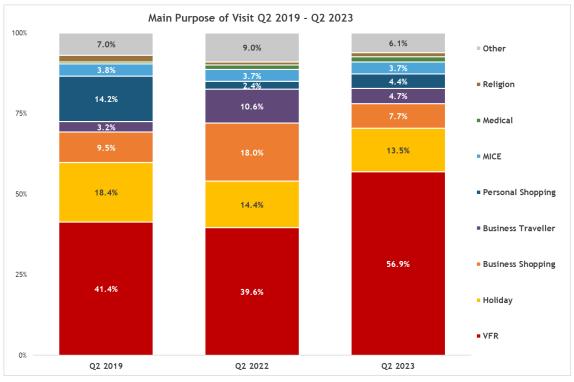
2.1% 3.0%	
3.1%	
8.7%	
3.4%	
7.1%	
4.1%	
5.6%	
36.9%	
6.0%	
15.8%	

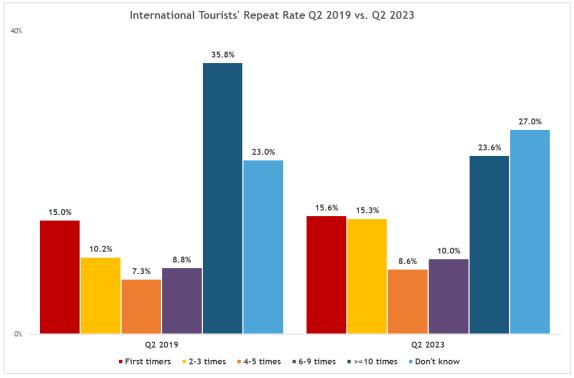
Jun-23 Share

¹ Statistical Release P0351: Tourism and Migration Statistics SA, July 2023.

PURPOSE OF TRAVEL

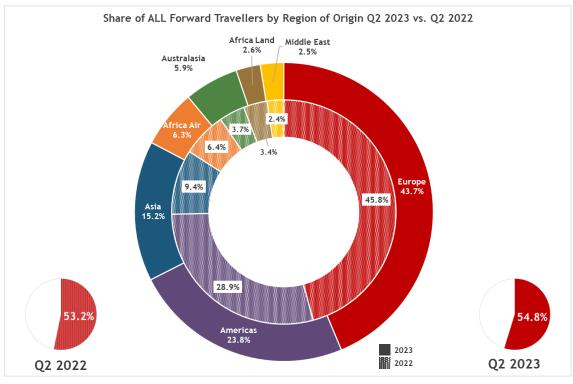
The second quarter in 2023 continues the turnaround in travellers' behaviour evidenced first in Q2 2022. VFR and holiday are even more dominant, surpassing their combined Q2 2019 levels (70.4% vs. 59.8%). The driving force behind this is VFR's extremely high share of 56.9% vs. 41.4% in Q2 2019, whereas holiday remains below Q2 2019 levels (13.5% vs. 18.4% in Q2 2019). This pattern has been in place since Q3 2022 when VFR surpassed its 2019 levels for the first time whilst holiday did not. Personal shopping remains far from its Q2 2019 levels.

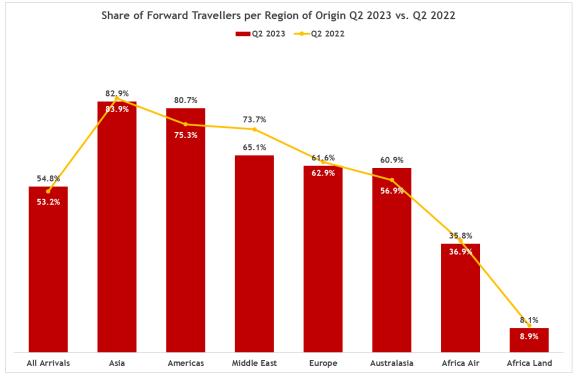




PURPOSE OF TRAVEL

Forward travel analysis shows that in Q2 2023 54.8% of travellers carried on to another destination. This is more than their share in Q2 2022 (53.2%) and in Q1 2023 (52.2%). Forward travellers are predominantly from Europe (43.7%), although this is much less so than was the case in Q1 2023 (57.9%) and less than their share in Q2 2022 (45.8%). The Americas (23.8%), Asia (15.2%), and Africa Air (6.3%) make up the rest (45.3%). Forward travel is most common amongst Asia & Americas tourists (82.9% & 80.7% respectively).





PURPOSE OF TRAVEL

The top ten forward markets have remained fairly stable over the past two years. The most popular forward destination appearing in all four regional lists below is the UAE. The UK is the second most popular destination and appears in all lists except for Africa Air. Qatar is the third most popular and appears in all forward lists. Kenya, Ethiopia, and Zimbabwe are first, second, and fourth on the Africa Air list respectively, and are also present in others except for Kenya missing from the Europe list. Besides tourism interests, this behaviour is of course the result of cheaper indirect flights or the unavailability of direct flights.

Europe Top 10 Forward	% Share
Markets	Q2 2023
UAE	13.5%
Netherlands	12.0%
Qatar	10.5%
UK	9.7%
Ethiopia	9.4%
Germany	8.1%
Turkey	8.0%
Switzerland	4.6%
France	4.2%
Zimbabwe	3.9%
All Europe Forward Tourists	43.7%

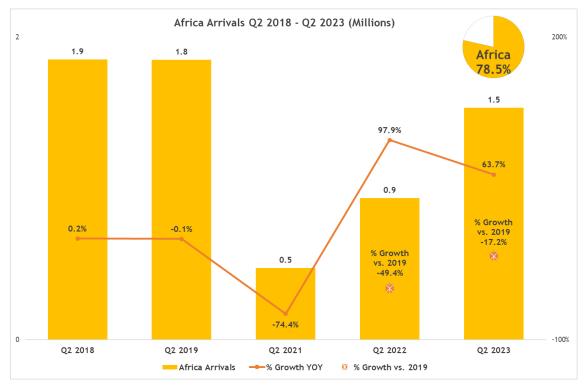
Asia Top 10 Forward	% Share
Markets	Q2 2023
UAE	45.9%
Qatar	15.4%
Ethiopia	12.9%
Kenya	8.1%
Singapore	8.1%
UK	1.9%
Zimbabwe	1.5%
Botswana	1.1%
Namibia	0.6%
Zambia	0.5%
Others in Top 10 Q2	
2022:	
Turkey	0.3%
Australia	0.2%
Egypt	0.1%
All Asia Forward	45 20/
Tourists	15.2%

Americas rop ro	
Forward Markets	Q2 2023
UK	23.0%
Zimbabwe	15.9%
Netherlands	10.0%
Botswana	7.0%
UAE	5.8%
Qatar	5.4%
Germany	4.9%
France	4.1%
Kenya	3.1%
Ethiopia	3.0%
Others in Top 10 Q2 2022:	
Zambia	1.1%
All Americas Forward	23.8%
Tourists	0/ 61
Africa Air Top 10	% Share
Forward Markets	Q2 2023
Kenya	31.4%
Kenya Ethiopia	31.4% 20.8%
Kenya	31.4%
Kenya Ethiopia Malawi Zimbabwe	31.4% 20.8% 15.2% 4.8%
Kenya Ethiopia Malawi Zimbabwe UAE	31.4% 20.8% 15.2% 4.8% 4.7%
Kenya Ethiopia Malawi Zimbabwe	31.4% 20.8% 15.2% 4.8% 4.7% 3.6%
Kenya Ethiopia Malawi Zimbabwe UAE	31.4% 20.8% 15.2% 4.8% 4.7%
Kenya Ethiopia Malawi Zimbabwe UAE Zambia	31.4% 20.8% 15.2% 4.8% 4.7% 3.6% 2.3% 2.2%
Kenya Ethiopia Malawi Zimbabwe UAE Zambia France	31.4% 20.8% 15.2% 4.8% 4.7% 3.6% 2.3%
Kenya Ethiopia Malawi Zimbabwe UAE Zambia France Qatar	31.4% 20.8% 15.2% 4.8% 4.7% 3.6% 2.3% 2.2%
Kenya Ethiopia Malawi Zimbabwe UAE Zambia France Qatar Ghana Mozambique Others in Top 10 Q2	31.4% 20.8% 15.2% 4.8% 4.7% 3.6% 2.3% 2.2% 1.6%
Kenya Ethiopia Malawi Zimbabwe UAE Zambia France Qatar Ghana Mozambique Others in Top 10 Q2 2022:	31.4% 20.8% 15.2% 4.8% 4.7% 3.6% 2.3% 2.2% 1.6% 1.5%
Kenya Ethiopia Malawi Zimbabwe UAE Zambia France Qatar Ghana Mozambique Others in Top 10 Q2 2022: Rwanda	31.4% 20.8% 15.2% 4.8% 4.7% 3.6% 2.3% 2.2% 1.6% 1.5%
Kenya Ethiopia Malawi Zimbabwe UAE Zambia France Qatar Ghana Mozambique Others in Top 10 Q2 2022: Rwanda Egypt	31.4% 20.8% 15.2% 4.8% 4.7% 3.6% 2.3% 2.2% 1.6% 1.5%
Kenya Ethiopia Malawi Zimbabwe UAE Zambia France Qatar Ghana Mozambique Others in Top 10 Q2 2022: Rwanda	31.4% 20.8% 15.2% 4.8% 4.7% 3.6% 2.3% 2.2% 1.6% 1.5%

Americas Top 10

% Share

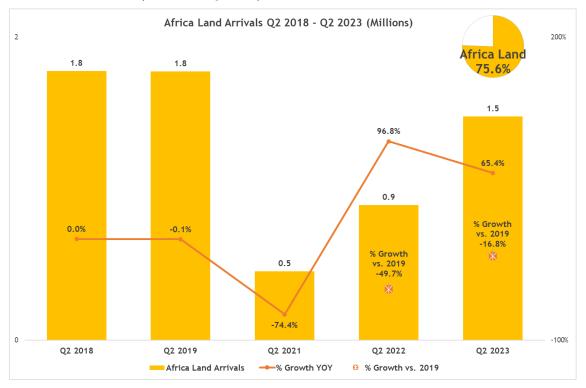
Africa tourists accounted for 78.5% of all arrivals in Q2 2023 and amounted to 1.5 million. Compared to Q2 2019, Africa's recovery is slightly better than that of South Africa as a whole (-17.2% vs. -18.4% respectively). Of course, Africa's recovery this quarter (-17.2%) is further improvement on the previous three quarters (-21.5%, -31.7%, -34.4% vs. the respective quarters in 2019). In terms of source countries, Zimbabwe continues to be the most dominant source with a 32.9% share while Mozambique continues to strengthen and maintain its relatively new second place (20.4%). This comes mainly at the expense of Botswana, Lesotho & eSwatini which have lost significant share since Q2 2019 (-4.1%, -2.4% & -0.7% points respectively). Kenya is the source country with the highest positive growth rate on the Top 10 list (+31.0% vs. Q2 2019). This is very similar to Kenya's Q1 2023 growth rate (+31.7%). Botswana on the other hand, is showing by far the lowest recovery out of all Top 10 Africa source markets and remains -52.5% below Q2 2019.



Africa Tourist Arrivals by Top 10 Markets Q2 2023

Africa Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth Q2 2019 - Q2 2023
Zimbabwe	504,749	28.8%	32.9%	-5.2%
Mozambique	313,234	16.8%	20.4%	0.5%
Lesotho	290,534	21.3%	19.0%	-26.3%
eSwatini	179,742	12.4%	11.7%	-21.9%
Botswana	84,350	9.6%	5.5%	-52.5%
Namibia	39,812	2.5%	2.6%	-15.5%
Zambia	35,061	2.0%	2.3%	-6.5%
Malawi	28,320	2.3%	1.8%	-34.3%
Kenya	9,467	0.4%	0.6%	31.0%
Angola	8,947	0.7%	0.6%	-35.0%
All Africa Arrivals	1,532,460	77.4%	78.5%	-17.2%

Africa Land tourists amounted to 1.5 million as they did in Q1 2023 and naturally continue to form the bulk of all arrivals in South Africa (75.6%). This is so to an even greater extent than in 2022 when Africa Land arrivals amounted to 71.0% of all. Africa Land recovery (-16.8%) is slightly better than that of Africa (-17.2%) when compared to Q2 2019. Africa Land's recovery is also the lowest negative growth rate out of all regions this quarter, and is outdone only by the Middle East's positive +4.4% vs. Q2 2019. Just as is the case with Africa overall arrivals, Zimbabwe and Mozambique are the largest source countries with even more dominant shares (34.2% & 21.2%). Here too, their improved shares (+4.2% & +3.7% points respectively), and Mozambique's relatively recently gained second place, come mainly at the expense of Botswana, Lesotho, and eSwatini (-4.3%, -2.5% & -0.8% points respectively) when compared to Q2 2019. Mozambique is the only country on the Top 10 Africa Land list with a positive recovery rate (+0.5%) while Botswana is of course also the least to recover in terms of Africa Land (-52.5% vs. Q2 2019).



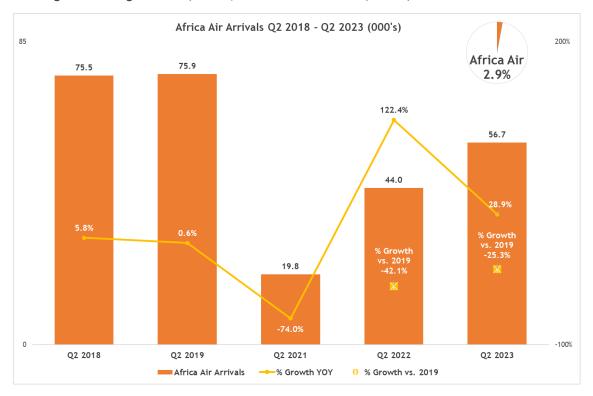
Africa Land Tourist Arrivals by Market Q2 2023

Africa Land Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth Q2 2019 - Q2 2023
Zimbabwe	504,749	30.0%	34.2%	-5.2%
Mozambique	313,234	17.6%	21.2%	0.5%
Lesotho	290,534	22.2%	19.7%	-26.3%
eSwatini	179,742	13.0%	12.2%	-21.9%
Botswana	84,350	10.0%	5.7%	-52.5%
Namibia	39,812	2.7%	2.7%	-15.5%
Zambia	35,061	2.1%	2.4%	-6.5%
Malawi	28,320	2.4%	1.9%	-34.3%
All Africa Land Arrivals	1,475,802	74.2%	75.6%	-16.8%

-25.3% •

Q2 2023 vs. Q2 2019

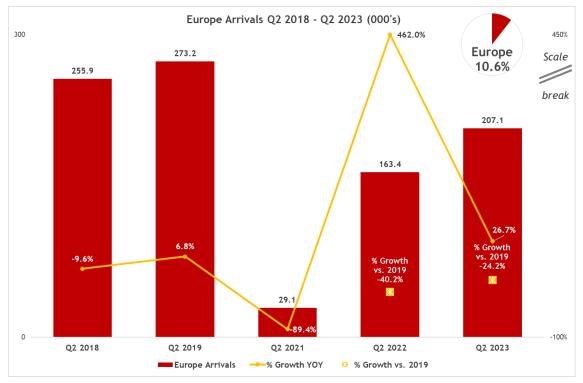
Africa Air arrivals amounted to 56.7 thousand, representing a 2.9% share of all international arrivals in South Africa. Unlike the previous quarter (Q1 2023) when the region's recovery was slower than in the previous quarter (-32.1% in Q1 2023 vs. -27.7% in Q4 2022), this quarter the recovery is more upbeat and stands at -25.3% vs. Q2 2019. This is most likely due to the region's disproportionately high share of business travellers and their rebound once the holiday season is over. The Top Ten source country list shows that Africa Air's arrival patterns have yet to return to their former shape. Angola, Nigeria, and the DRC, are the slowest to recover (-35.0%, -62.1% & -36.0% vs. Q2 2019 respectively). The former two remain displaced from first and second place by Kenya's dramatically high, and Tanzania's fairly high, recovery rates (+31.0% & -9.6% vs. Q2 2019 respectively). Ethiopia's fairly high recovery rate should also be noted (-4.8% vs. Q2 2019) although this comes off a very low base. Mauritius, Egypt, and Uganda are showing recoveries which are relatively In line with the region's average -25.3% (-18.7%, -22.3% & -24.5% vs. Q2 2019).



Africa Air Tourist Arrivals by Top 10 Markets Q2 2023

Africa Air Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth Q2 2019 - Q2 2023
Kenya	9,467	9.5%	16.7%	31.0%
Angola	8,947	18.1%	15.8%	-35.0%
Tanzania	8,079	11.8%	14.3%	-9.6%
DRC	4,702	9.7%	8.3%	-36.0%
Nigeria	4,241	14.7%	7.5%	-62.1%
Mauritius	4,129	6.7%	7.3%	-18.7%
Ghana	2,789	5.6%	4.9%	-33.8%
Uganda	2,616	4.6%	4.6%	-24.5%
Egypt	1,459	2.5%	2.6%	-22.3%
Ethiopia	1,402	1.9%	2.5%	-4.8%
All Africa Air Arrivals	56,658	3.2%	2.9%	-25.3%

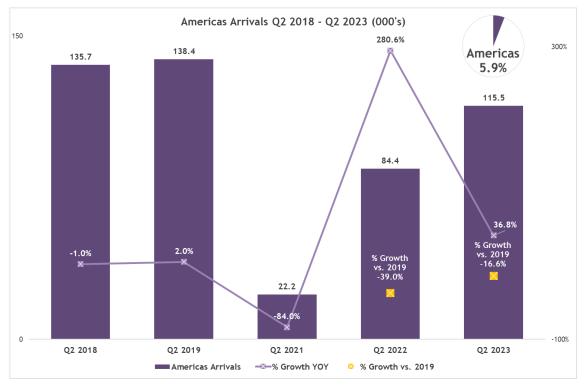
European arrivals in Q2 2023 amounted to 207.1 thousand and accounted for only 10.6% of arrivals (vs. 18.3% & 15.8% in Q1 2023 & 2022 respectively). However, a similar pattern also existed in Q2 2019 and Q2 2022 when European arrivals amounted to 11.4% and 13.2% of all arrivals respectively. This is probably due to Europeans' preference for visiting SA in the summer in order to avoid their winter. This second quarter, Europe's recovery compared to Q2 2019 is -24.2% and is lower than the average -18.4%. It's outdone only by Asia's -32.6%. Out of all the regions, Europe is showing the lowest growth rate compared to Q2 2022 (+26.7%). This is very much unlike Q2 2022 when European arrivals were +462.0% over Q2 2021 (second highest). The Top Ten list remains unchanged except for Portugal, ousted by the list by Russia's meteoric growth (+57.6% vs. Q2 2019), evident ever since travel restrictions were lifted in October 2020. Second to this is only Ireland's +0.6% growth rate, while all other European countries continue to show negative growth compared to Q2 2019.



Europe Tourist Arrivals by Top 10 Markets Q2 2023

Europe Top 10 Markets Q2 2023	Tourist % Share rope Top 10 Markets Q2 2023 Arrivals Q2 2019 2023		% Share Q2 2023	% Growth Q2 2019 - Q2 2023	
UK	60,575	29.8%	29.3%	-25.5%	
Germany	32,716	17.4%	15.8%	-31.0%	
France	24,990	11.7%	12.1%	-21.7%	
The Netherlands	19,914	8.0%	9.6%	-9.1%	
Italy	8,834	4.4%	4.3%	-27.0%	
Belgium	7,340	3.7%	3.5%	-28.0%	
Switzerland	6,925	3.3%	3.3%	-24.3%	
Ireland	6,162	2.2%	3.0%	0.6%	
Spain	6,098	3.4%	2.9%	-34.6%	
Russian Federation	5,293	1.2%	2.6%	57.6%	
Others in Top 10 Q2 2019:					
Portugal	4,854	2.7%	2.3%	-33.3%	
All Europe Arrivals	207,092	11.4%	10.6%	-24.2%	

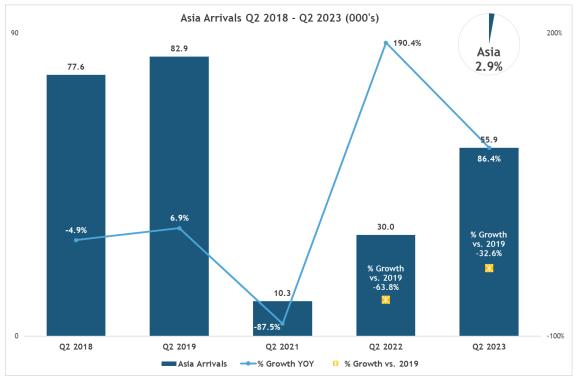
In Q2 2023, travel from the Americas amounted to 115.5 thousand, reflecting a -16.6% decline rate vs. Q2 2019, and a further improvement on Q1's -21.8% over Q1 2019. This is the second best recovery rate after the Middle East's +4.4% (vs. Q2 2019). The Americas thus accounted for 5.9% of arrivals this quarter - practically the same share as in 2022 (5.7%) and in Q2 2019 (5.8%). The recovery is also an impressive +36.8% compared to Q2 2022 but is not as stunning as in Q1 2023 or Q2 2022 when arrivals were +135.4% and +280.6% vs. Q1 2022 and Q2 2021, respectively. USA domination continues and is now 82.6% of all (+10.4% points vs. Q1 2023) brought on by a very low decline rate (-4.6% vs. Q2 2019). Unlike the previous three quarters, Canada's share has declined slightly vs. Q2 2019 and is now 9.7%. Brazil & Argentina continue to lag behind with very high decline rates (-74.4% and -73.7% vs. Q2 2019) but truly significant share losses are evident only in the case of Brazil.



Americas Tourist Arrivals by Top 10 Markets Q2 2023

Americas Top 10 Markets Q2 2023	Tourist % Share Q2 ricas Top 10 Markets Q2 2023 Arrivals Q2 2019 2023		% Share Q2 2023	% Growth Q2 2019 - Q2 2023
USA	95,354	72.2%	82.6%	-4.6%
Canada	11,237	9.9%	9.7%	-17.8%
Brazil	4,175	11.8%	3.6%	-74.4%
Mexico	1,231	1.0%	1.1%	-11.1%
Argentina	679	1.9%	0.6%	-73.7%
Colombia	376	0.4%	0.3%	-33.1%
Peru	366	0.4%	0.3%	-38.3%
Chile	359	0.7%	0.3%	-63.1%
Jamaica	185	0.2%	0.2%	-25.7%
Costa Rica	162	0.1%	0.1%	-5.3%
Others in Top 10 Q2 2019:				
Uruguay	133	0.2%	0.1%	-59.3%
Ecuador	114	0.2%	0.1%	-55.3%
All Americas Arrivals	115,461	5.8%	5.9%	-16.6%

This second quarter of 2023, Asia arrivals have begun to truly recover and are only -32.6% down on Q2 2019. This is an improvement on Q1 2023's -47.4% vs. Q1 2019, but is still the lowest recovery rate out of all the regions. This Q2 of 2023 Asia arrivals amounted to 55.9 thousand and a 2.9% share. This is still much less than their Q2 2019 3.5% share but is clearly an improvement since Q1 2023's 1.9% and 2022's 2.1% shares. Since Asia arrivals are the last to recover, they are also showing almost the highest year-on-year recovery of +86.4% vs. Q2 2022. On this count, they are second only to Australasia's +88.2% over Q2 2022. This is reminiscent of Q1 2023 and Q2 2022, when results were +121.5% third highest, and +190.4% fourth highest, vs. Q1 2022 & Q2 2021, respectively. As in Q1 2023, growth rates of countries in the Indian subcontinent are in the lead, with Bangladesh first, followed by Pakistan and India (+40.7%, -8.0%, & -18.6% vs. Q2 2019 respectively). In terms of arrivals share, India remains in a firm further improved first place, accounting for 45.3% of arrivals (+7.8% points vs. Q2 2019). Malaysia, Japan, China, and South Korea continue to show the lowest recovery rates (-54.8%, -54.4%, -50.7%, & -44.6% vs. Q2 2019 respectively).



Asia Tourist Arrivals by Top 10 Markets Q2 2023

Asia Top 10 Markets Q2 2023	Tourist % S Asia Top 10 Markets Q2 2023 Arrivals Q2 2023		% Share Q2 2023	% Growth Q2 2019 - Q2 2023
India	25,313	37.5%	45.3%	-18.6%
China	10,194	24.9%	18.2%	-50.7%
Pakistan	3,204	4.2%	5.7%	-8.0%
Japan	3,057	8.1%	5.5%	-54.4%
Singapore	2,336	3.8%	4.2%	-25.1%
South Korea	2,099	4.6%	3.8%	-44.6%
Bangladesh	1,955	1.7%	3.5%	40.7%
Malaysia	1,610	4.3%	2.9%	-54.8%
Philippines	1,608	2.7%	2.9%	-28.1%
Thailand	1,506	2.6%	2.7%	-31.0%
All Asia Arrivals	55,925	3.5%	2.9%	-32.6%

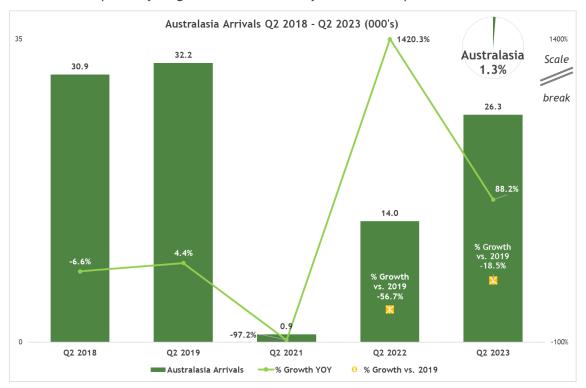
AUSTRALASIA ARRIVALS

26 K

-18.5% •

Q2 2023 vs. Q2 2019

Australasian tourist arrivals continue to show tremendous recovery with the third best regional recovery rate of -18.5% vs. Q2 2019. Australasian arrivals amounted to 26.3 thousand and a 1.3% share. This is the same as their share in Q2 2019 and is a further improvement on their 2022's 1.1% and Q1 2023's 1.2%. Australasia arrivals are showing the highest year-on-year growth with +88.2% over Q2 2022. This is of course no match for Q2 2022's +1420.3% and Q1 2023's +244.3% (vs. Q2 2021 & Q1 2022 respectively). Australasia has no doubt made up for ground lost in Q1-Q2 2021 when it exhibited the lowest recovery rate out of all the regions (-97.6% & -97.2% respectively). Dynamics within the Australasia region seem to have changed with New Zealand showing fantastic growth of +34.7% while Australasia's is a negative -25.5% over Q2 2019, respectively. This has helped to bolster New Zealand's share by +7.6% points whereas Australia has lost -7.4% point compared to Q2 2019. It's likely that New Zealand's recovery has been a late bloomer due to the very strict travel restrictions imposed by its government at the very outset of the pandemic.

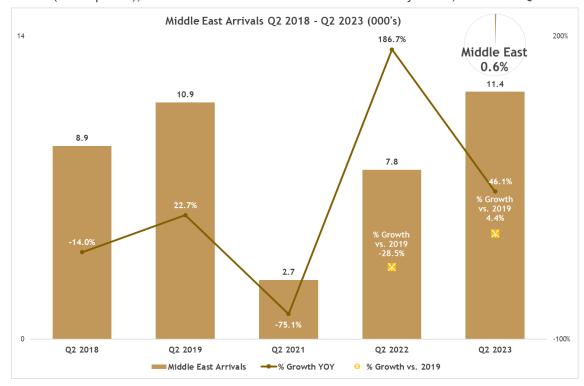


Australasia Tourist Arrivals by Market Q2 2023

Australasia Top 5 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth Q2 2019 - Q2 2023
Australia	21,238	88.4%	80.9%	-25.5%
New Zealand	4,913	11.3%	18.7%	34.7%
Fiji	42	0.1%	0.2%	5.0%
Papua New Guinea	35	0.1%	0.1%	45.8%
Tonga	17	0.0%	0.1%	21.4%
All Australasia Arrivals	26,259	1.3%	1.3%	-18.5%



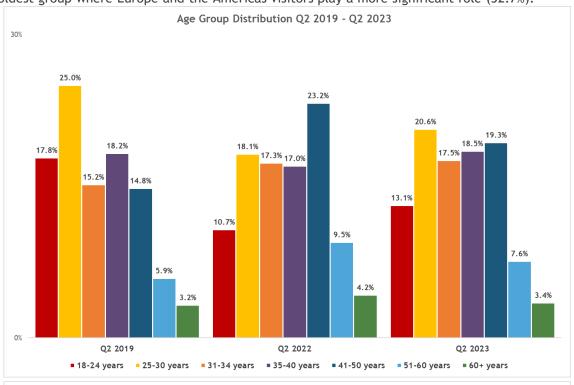
In Q2 2023, Middle East arrivals amounted to 11.4 thousand and a 0.6% share. This marks more than a total recovery over Q2 2019 when arrivals were 10.9 thousand and represented a 0.5% share. It's not surprising then that the region's +4.4% recovery rate over Q2 2019 is the highest and the only positive one. The same occurred in Q1 2023 when arrivals from the Middle East were only -7.0% less than their Q1 2019 counterparts, with this being the highest regional recovery rate. Recovery is even greater in year-on-year terms with Q2 2023 showing growth of +46.1% over Q2 2022 although in Q1 2023 this was more marked (+122.6% vs. Q1 2022). This is of course no match for Q2 2022's +186.7% vs. Q2 2021. As previously, Middle East arrivals are dominated by Israel with a 35.1% share but, this quarter, much less so than in Q2 2019 (45.6%). This Q2, the UAE is also showing the highest growth rate followed by Qatar, Kuwait, & Saudi Arabia (+185.3%, +54.4%, +49.5%, & +39.3% respectively). Missing from the positive growth list is Iran with -12.9% over Q2 2019 compared to +29.9% in Q1 2023. The UAE's amazing growth has resulted in a much improved share (+7.2% points), while Saudi Arabia has bolstered its share by +8.1%, both over Q2 2019.

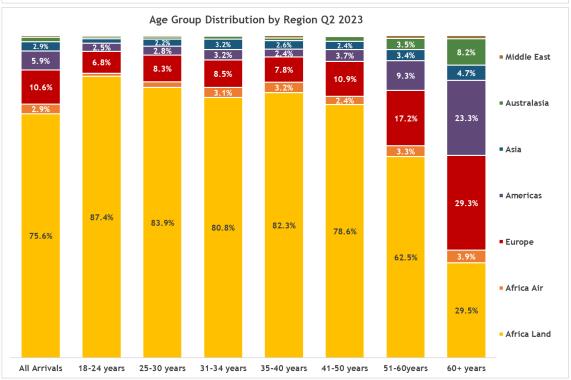


Middle East Tourist Arrivals by Top 10 Markets Q2 2023

Middle East Top 10 Markets Q2 2023 Arrivals Q2 2023 % Share Q2 2019 % Share Q2 2023 Q2 2019 Q2 2023 Israel 4,008 45.6% 35.1% -19.6% Saudi Arabia 3,681 24.2% 32.2% 39.3% United Arab Emirates 1,298 4.2% 11.4% 185.3% Lebanon 632 7.5% 5.5% -23.0% Jordan 467 5.0% 4.1% -15.2% Kuwait 308 1.9% 2.7% 49.5% Qatar 301 1.8% 2.6% 54.4% Iran 296 3.1% 2.6% -12.9% Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%		,		~	
Saudi Arabia 3,681 24.2% 32.2% 39.3% United Arab Emirates 1,298 4.2% 11.4% 185.3% Lebanon 632 7.5% 5.5% -23.0% Jordan 467 5.0% 4.1% -15.2% Kuwait 308 1.9% 2.7% 49.5% Qatar 301 1.8% 2.6% 54.4% Iran 296 3.1% 2.6% -12.9% Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%	Middle East Top 10 Markets Q2 2023	Arrivals Q2			% Growth Q2 2019 - Q2 2023
United Arab Emirates 1,298 4.2% 11.4% 185.3% Lebanon 632 7.5% 5.5% -23.0% Jordan 467 5.0% 4.1% -15.2% Kuwait 308 1.9% 2.7% 49.5% Qatar 301 1.8% 2.6% 54.4% Iran 296 3.1% 2.6% -12.9% Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%	Israel	4,008	45.6%	35.1%	-19.6%
Lebanon 632 7.5% 5.5% -23.0% Jordan 467 5.0% 4.1% -15.2% Kuwait 308 1.9% 2.7% 49.5% Qatar 301 1.8% 2.6% 54.4% Iran 296 3.1% 2.6% -12.9% Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%	Saudi Arabia	3,681	24.2%	32.2%	39.3%
Jordan 467 5.0% 4.1% -15.2% Kuwait 308 1.9% 2.7% 49.5% Qatar 301 1.8% 2.6% 54.4% Iran 296 3.1% 2.6% -12.9% Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%	United Arab Emirates	1,298	4.2%	11.4%	185.3%
Kuwait 308 1.9% 2.7% 49.5% Qatar 301 1.8% 2.6% 54.4% Iran 296 3.1% 2.6% -12.9% Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%	Lebanon	632	7.5%	5.5%	-23.0%
Qatar 301 1.8% 2.6% 54.4% Iran 296 3.1% 2.6% -12.9% Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%	Jordan	467	5.0%	4.1%	-15.2%
Iran 296 3.1% 2.6% -12.9% Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%	Kuwait	308	1.9%	2.7%	49.5%
Yemen 116 1.6% 1.0% -34.1% Syria 108 1.6% 0.9% -37.2%	Qatar	301	1.8%	2.6%	54.4%
Syria 108 1.6% 0.9% -37.2%	Iran	296	3.1%	2.6%	-12.9%
	Yemen	116	1.6%	1.0%	-34.1%
	Syria	108	1.6%	0.9%	-37.2%
	•	11,422	0.5%	0.6%	4.4%

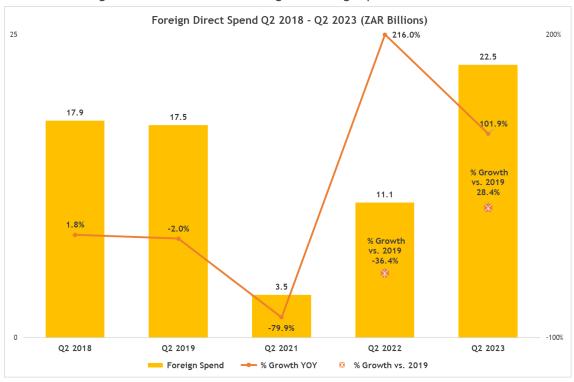
International travellers' age distribution continues to improve and is more evenly distributed across the age brackets than was the case in Q2 2022. This quarter is still heavier on the older groups (31-60 years, 62.9% vs. 54.0% in Q2 2019), and is still markedly lighter on the younger ones (18-30 years 33.7% vs. 42.7% in Q2 2019). Africa Land of course contributes the bulk of all visitors in all age groups (62.5% and upwards) except for the oldest group where Europe and the Americas visitors play a more significant role (52.7%).

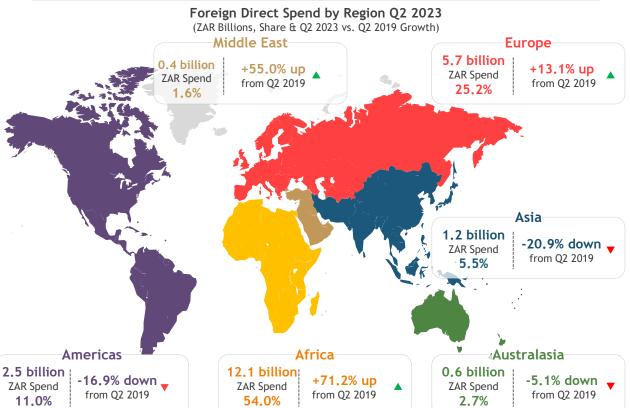






Foreign spend continues to show significant recovery as was also the case in Q1 2023 & Q4 2022. Spend by foreign tourists equals ZAR 22.5 billion this quarter and is showing a marked positive increase of +28.4% over Q2 2019 results. Hence, spend has clearly outdone Q2 2022 and is +101.9% greater. This is an all-time high for foreign spend.

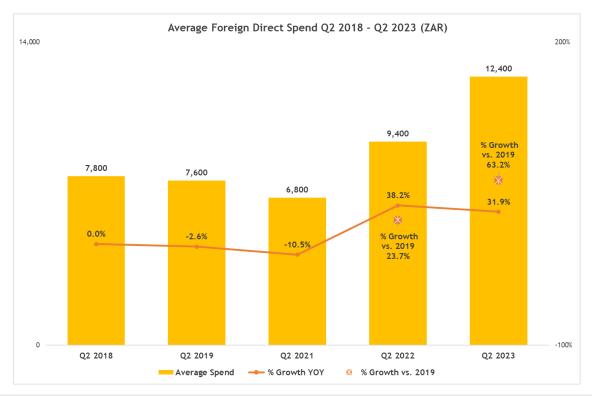




Patterns evident in foreign direct spend since Q3 2022, are evident this second quarter as well. Hence, the greatest declines continue to be amongst Central & South America as well as Asia tourists (-48.0% & -20.9% vs. Q2 2019). However, although spend by Asia tourists is clearly recovering (-28.2% in Q1 2019), Central and South America tourists' spend is clearly standing still (-48.2% in Q1 2019). Most other regions are on the decline with the exception of Africa Land, Africa as a whole, the Middle East, and Europe (+88.1%, +71.2%, +55.0% & +13.1% vs. Q2 2019 respectively). Africa Land is therefore the main driving force behind overall spend growth (+28.4% vs. Q2 2019). In line with this, its share of spend has also grown tremendously by +15.5% share points (48.7% vs. 33.2% in Q2 2019). The average spend is ZAR 12,400, equivalent to a +63.2% increase over Q2 2019. This is an all-time high.

Foreign Direct Spend by Region Q2 2019 vs. Q2 2023

Dogion	Spend (ZAR Billions)		% SI	nare	% Growth	
Region	Q2 2019	Q2 2023	Q2 2019	Q2 2023	Q2 2023 vs. Q2 2019	
Africa	7.1	12.1	40.5%	54.0%	71.2%	
Africa Land	5.8	11.0	33.2%	48.7%	88.1%	
Africa Air	1.3	1.2	7.3%	5.3%	-6.3%	
Europe	5.0	5.7	28.6%	25.2%	13.1%	
Americas	3.0	2.5	17.0%	11.0%	-16.9%	
North America	2.6	2.3	15.0%	10.2%	-12.7%	
Central & S. America	0.4	0.2	2.0%	0.8%	-48.0%	
Asia	1.6	1.2	8.9%	5.5%	-20.9%	
Australasia	0.6	0.6	3.7%	2.7%	-5.1%	
Middle East	0.2	0.4	1.3%	1.6%	55.0%	
All Arrivals	17.5	22.5	100.0%	100.0%	28.4%	



As mentioned on the previous page, average spend has grown considerably this quarter and equals ZAR 12,400. This is equivalent to a +63.2% increase over Q2 2019. Although the resultant ZAR 12,400 is lower than Q1 2023's ZAR 13,100 (+32.6% vs. Q1 2019), this is also an all-time high for Q2 as was the case in Q1. Unlike overall spend, average spend is on the increase in all regions with Africa Land of course showing the highest growth (+133.3% vs. Q2 2019). Next in line is South & Central Americas with +66.3% growth over Q2 2019.

Average Foreign Direct Spend by Region Q2 2019 - Q2 2023

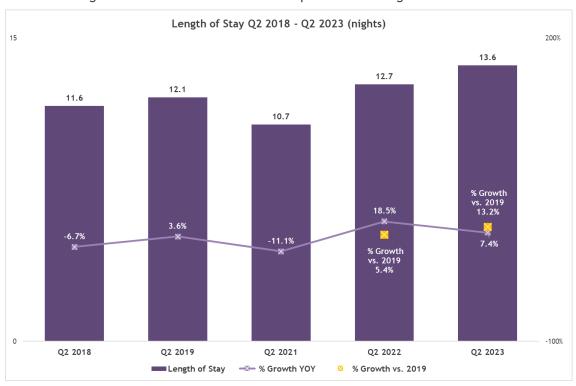
Pogion	Ave	rage Spend (Z	% Growth		
Region	Q2 2019	Q2 2022	Q2 2023	Q2 2023 vs. Q2 2019	
Africa	3,900	4,700	8,200	110.3%	
Africa Land	3,300	3,900	7,700	133.3%	
Africa Air	20,100	23,500	26,200	30.3%	
Europe	20,800	22,600	30,600	47.1%	
Americas	23,700	32,100	32,600	37.6%	
North America	24,700	32,400	33,100	34.0%	
Central & South America	16,300	27,300	27,100	66.3%	
Asia	21,000	17,400	25,700	22.4%	
Australasia	21,700	22,200	24,600	13.4%	
Middle East	24,300	29,500	35,400	45.7%	
All Arrivals	7,600	9,400	12,400	63.2%	

Since foreign spend has more than fully recovered this quarter and now totals ZAR 22.5 billion, almost all expenditure categories are showing positive growth over Q2 2019. The highest growth is in the business shopping and personal shopping categories (+158.9% & +19.9% vs. Q2 2019 respectively). This is in line with overall spend growth stemming mainly from Africa Land and the same pattern was evident in Q1 2023 as well. Transport has grown by +10.4% while medical expenditure grew by +65.7% over Q2 2019, but of course, the latter is off a very small base. Food & beverages and leisure activities have grown similarly by +2.8% and +2.7% over Q2 2019 respectively. Accommodation has declined very slightly (-1.6% vs. Q2 2019) and may be considered stagnant.

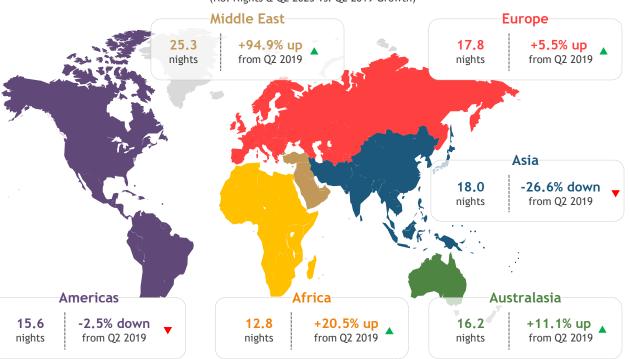
Foreign Direct Spend by Type Q2 2019 - Q2 2023

Spand Catagory	ZAR Billions		% Share		% Growth	
Spend Category	Q2 2019	Q2 2023	Q2 2019	Q2 2023	Q2 2023 vs. Q2 2019	
Personal Shopping	5.2	6.3	29.8%	27.9%	19.9%	
Business Shopping	1.5	3.9	8.7%	17.5%	158.9%	
Food & Beverages	3.1	3.2	17.6%	14.1%	2.8%	
Accommodation	2.6	2.6	15.0%	11.5%	-1.6%	
Leisure	2.2	2.2	12.3%	9.9%	2.7%	
Transport	1.6	1.8	9.2%	7.9%	10.4%	
Medical	0.2	0.3	0.9%	1.2%	65.7%	
All Types	17.5	22.5	100.0%	100.0%	28.4%	

This quarter, length of stay continues to surpass 2019 levels and now equals 13.6 nights. This is growth of +13.2% over Q2 2019 but is however lower than Q1 2023's +23.3% increase over Q1 2019. On the other hand, it's higher than Q2 2022's +5.4% over Q2 2019. The Middle East continues to show the longest stays (25.3 nights), followed by Asia (18.0 nights). The overall average for overseas tourists is 17.5 compared to 12.8 nights for Africa tourists.

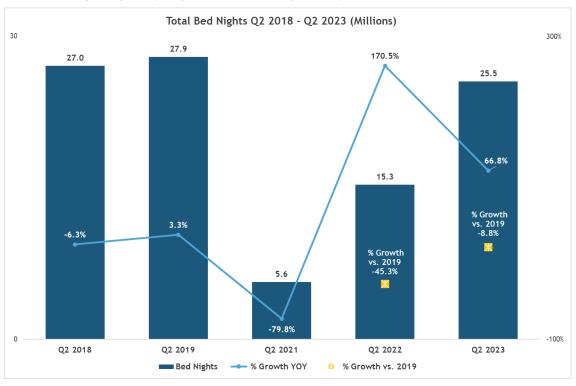


Length of Stay Q2 2023 (No. Nights & Q2 2023 vs. Q2 2019 Growth)





Bed nights have recovered substantially this Q2 2023 and amount to 25.5 million. However, they are still slightly lower than Q2 2019's 27.9 million (-8.8% vs. Q2 2019). The overwhelming bulk of bed nights originate with Africa tourists (76.3%), the next biggest contributor being Europe (13.0%). All regions are still down except for the Middle East and Africa having completely or just recovered respectively (+105.7% & -0.2% vs. Q2 2019).

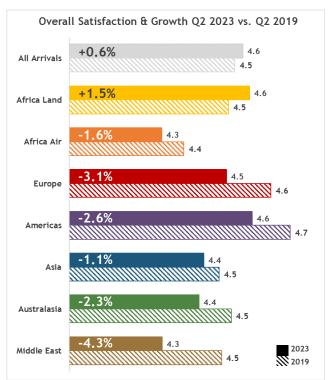


(Millions, Share & Q2 2023 vs. Q2 2019 Growth) Middle East Europe 3 million 3.3 million +105.7% up -18.7% down -Bed nights Bed nights from Q2 2019 from Q2 2019 1.0% 13.0% Asia 0.9 million -52.6% down Bed nights from Q2 2019 3.4% **Australasia Americas** 1.2 million 19.4 million 0.4 million -39.8% down -0.2% down -5.8% down Bed nights Bed nights Bed nights from Q2 2019 from Q2 2019 from Q2 2019 4.7% 76.3% 1.6%

Total Bed Nights Q2 2023

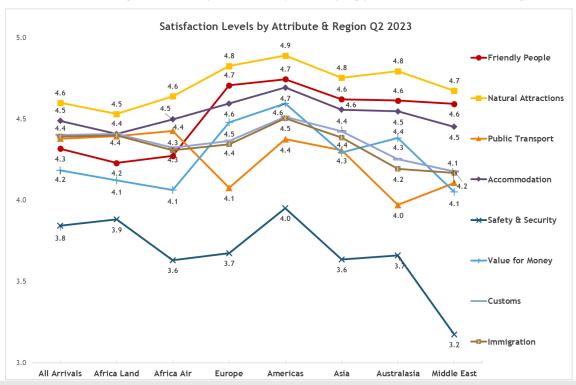
This quarter, international tourists' overall satisfaction with South Africa continues to improve over 2019 for the third time in a row since the first time in Q4 2022. Overall satisfaction is now a point higher than it was in Q2 2019 (4.6 vs. 4.5 and +0.6% over Q2 2019) but is equal in absolute terms to that of Q1 2023 as well as Q4 2022 (4.6). This is a significant result.

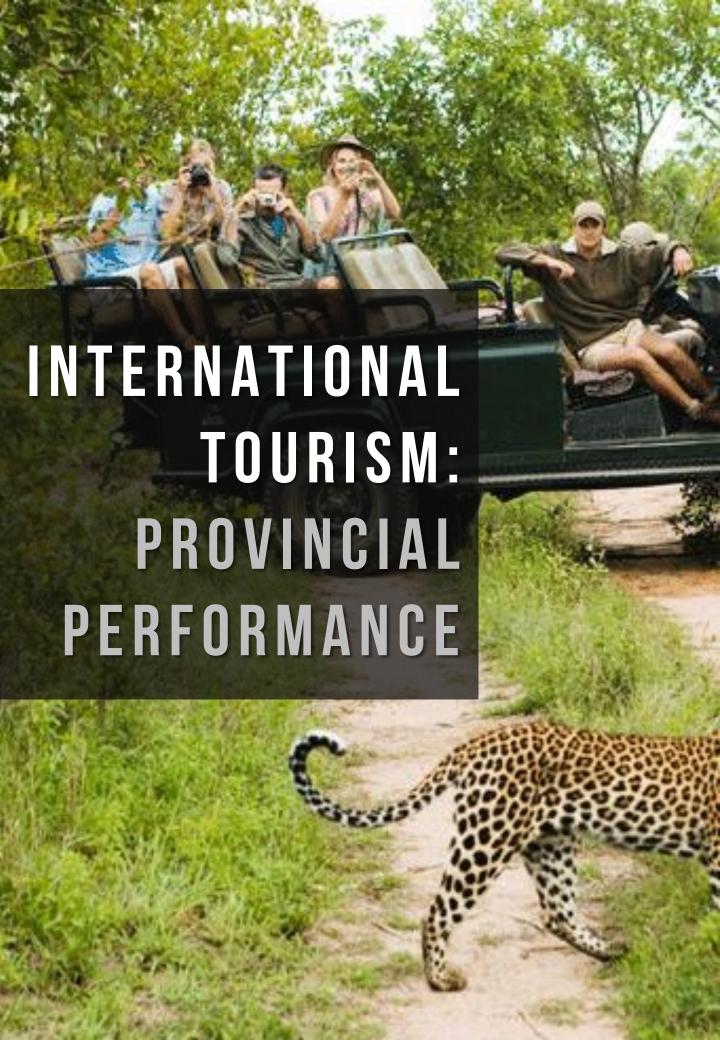
In stark contradiction to this, and as was also the case throughout 2022, regional satisfaction levels are in actual fact all going down except for Africa Land tourists (+1.5% vs. Q2 2019). The most dramatic results are for the Middle East which shows the highest declines in satisfaction levels once more (-4.3% vs. Q2 2019). Unlike previous quarters, it's Europe that shows the next highest



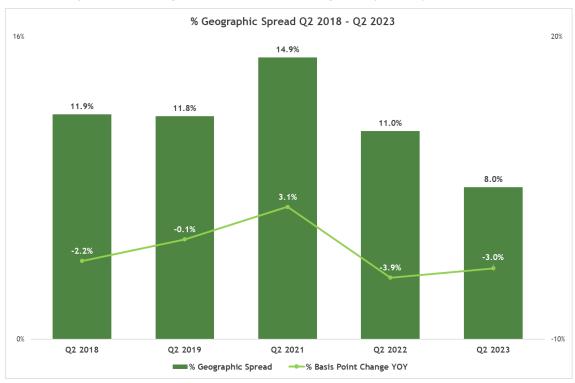
decline rate (-3.1% vs. Q2 2019), and not the Americas (-2.6% vs. Q2 2019).

In terms of satisfaction parameters, the same patterns continue to persist. South Africa's natural attractions receive the highest accolades. SA's friendly people is second for all regions except for Africa where accommodation is in a shared second place with transport, customs, and immigration. Safety and security is worryingly last on the list for all regions.





South Africa's geographic spread index has further declined this quarter to reach 8.0%. This is a loss of -3.0% basis points over Q2 2022 and has taken the index to levels unseen previously in Q2. International arrivals are the highest for Gauteng (0.84 m), followed by Mpumalanga (0.42 m), the Western Cape (0.24 m), and the Free State (0.23 m). The Eastern Cape's length of stay is the longest this quarter (16.4 nights), followed by the Eastern Cape, Western Cape, and Gauteng's 14.8, 14.7, and 14.4 nights respectively.

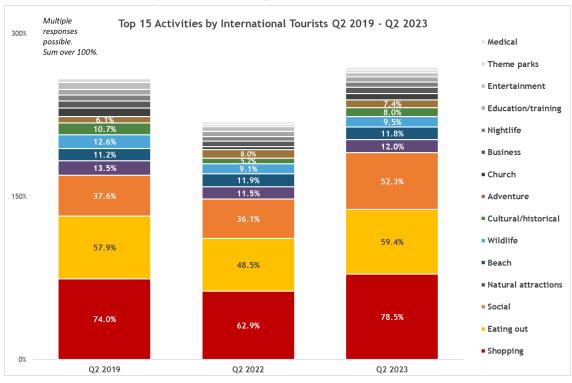


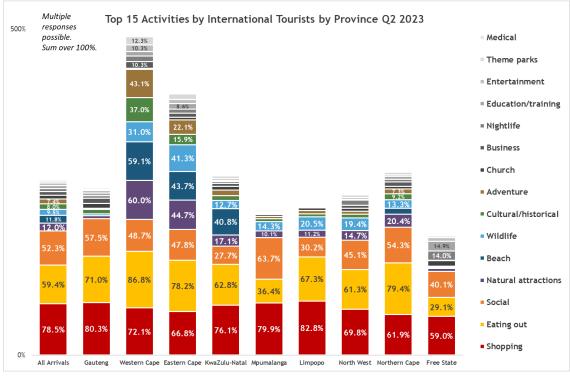
Tourist Arrivals, Spend, Bed Nights & Length of Stay by Province Q2 2023

Province	International Tourist Arrivals (000's) Q2 2023	Foreign Spend (ZAR Billions) Q2 2023	Bednights (Millions) Q2 2023	Length of Stay (nights) Q2 2023
Gauteng	839	10.9	11.4	14.4
Mpumalanga	421	1.7	3.9	9.7
Western Cape	244	4.8	3.4	14.7
Free State	229	0.5	2.6	11.8
KwaZulu-Natal	148	1.4	1.5	10.8
Limpopo	131	1.3	0.8	6.6
North West	74	0.6	0.6	8.2
Eastern Cape	58	1.1	0.9	16.4
Northern Cape	23	0.2	0.3	14.8

^{*}Geographic spread being the share of tourists visiting 2 provinces or more.

The full spectrum of tourist activities has been restored as well as strengthened. Top activities include shopping, eating out, social engagements, natural attractions, going to the beach, wildlife viewing, visiting cultural and historical attractions, as well as adventure experiences. A provincial look brings out Western Cape's and Eastern Cape's highly active nature, to be followed by the Northern Cape as well as Kwa-Zulu Natal.







Gauteng International Tourist Arrivals by Top 10 Source Markets Q2 2023

	-	-		
Gauteng Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth 2023 vs. 2019
Zimbabwe	384,311	10.1%	45.8%	361.9%
Lesotho	60,151	13.4%	7.2%	-45.5%
Mozambique	55,658	18.3%	6.6%	-63.1%
Botswana	39,961	9.5%	4.8%	-48.7%
eSwatini	38,462	6.3%	4.6%	-26.1%
USA	31,192	5.3%	3.7%	-27.9%
Zambia	29,920	4.0%	3.6%	-9.7%
Malawi	26,173	3.9%	3.1%	-17.8%
UK	22,701	3.1%	2.7%	-11.6%
India	13,621	2.6%	1.6%	-36.4%
All Gauteng Arrivals	838,727	29.4%	38.7%	2.1%

Share of Gauteng Tourist Arrivals by Main Purpose Q2 2023

Gauteng	VFR	Holiday	Business Shopping	Business Traveller	Personal Shopping	MICE	Medical	Religion
Share Q2 2023	52.0%	12.7%	10.5%	7.1%	3.4%	5.5%	1.7%	1.0%
Basis Point Change vs. 2019	12.8%	-10.1	0.9%	0.4%	-0.7%	-0.8%	0.6%	-1.2%





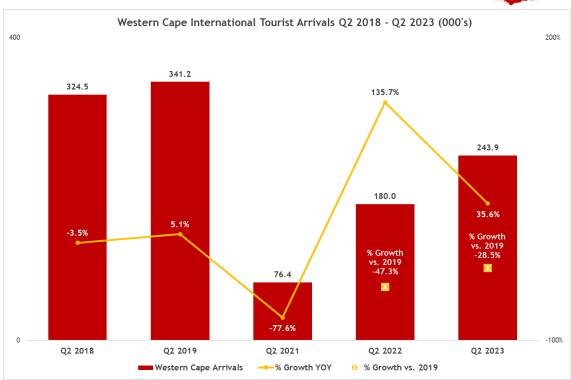
Mpumalanga International Tourist Arrivals by Top 10 Source Markets Q2 2023

Mpumalanga Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth 2023 vs. 2019
Mozambique	261,193	41.9%	62.1%	60.3%
eSwatini	83,827	26.1%	19.9%	-17.3%
USA	12,476	5.7%	3.0%	-43.8%
Zimbabwe	11,280	1.7%	2.7%	73.4%
France	6,435	2.3%	1.5%	-28.3%
Germany	6,361	2.4%	1.5%	-32.1%
UK	5,750	2.6%	1.4%	-43.8%
Netherlands	3,328	1.0%	0.8%	-14.5%
Australia	3,007	1.7%	0.7%	-53.9%
India	2,766	0.6%	0.7%	9.7%
Others in Top 10 Q2 2019:				
Lesotho	1,788	3.6%	0.4%	-87.1%
Brazil	592	1.2%	0.1%	-87.0%
All Mpumalanga Arrivals	420,674	13.9%	19.4%	8.2%

Share of Mpumalanga Tourist Arrivals by Main Purpose Q2 2023

Mpumalanga	VFR	Holiday		Business Traveller	Personal Shopping	MICE	Medical	Religion
Share Q2 2023	69.4%	16.3%	2.0%	0.5%	6.6%	0.3%	2.5%	0.4%
Basis Point Change vs. 2019	4.1%	-10.8%	1.0%	-0.5%	5.1%	-0.8%	2.3%	-0.3%



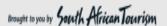


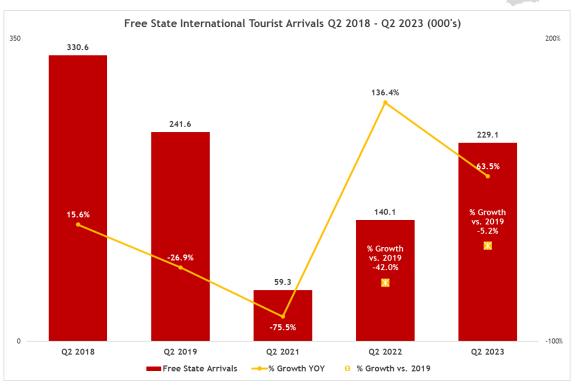
Western Cape International Tourist Arrivals by Top 10 Source Markets Q2 2023

Western Cape Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth 2023 vs. 2019
UK	32,529	13.7%	13.3%	-30.5%
USA	27,785	14.9%	11.4%	-45.4%
Namibia	23,218	6.5%	9.5%	5.4%
Zimbabwe	18,854	1.7%	7.7%	220.9%
Germany	18,579	8.0%	7.6%	-31.6%
France	13,017	4.9%	5.3%	-21.3%
Netherlands	9,486	3.3%	3.9%	-15.6%
Lesotho	8,429	3.8%	3.5%	-34.8%
Australia	8,009	3.8%	3.3%	-38.4%
India	7,561	3.5%	3.1%	-37.2%
Others in Top 10 Q2 2019:				
China incl. HK	2,933	2.7%	1.2%	-68.3%
All Western Cape Arrivals	243,936	12.2%	11.3%	-28.5%

Share of Western Cape Tourist Arrivals by Main Purpose Q2 2023

Western Cape	VFR	Holiday	Business Shopping	Business Traveller	Personal Shopping	MICE	Medical	Religion
Share Q2 2023	27.5%	48.2%	0.1%	6.4%	0.1%	8.1%	0.9%	0.7%
Basis Point Change vs. 2019	6.3%	-3.89	-3.59	2.1%	-1.1%	-0.1%	0.3%	0.4%





Free State International Tourist Arrivals by Top 10 Source Markets Q2 2023

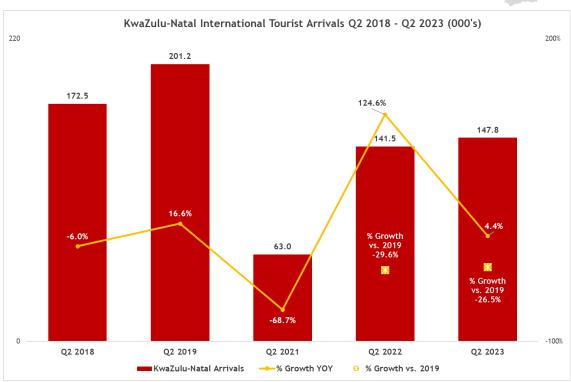
Free State Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth 2023 vs. 2019
Lesotho	211,600	90.7%	92.3%	-3.4%
Zimbabwe	5,486	0.1%	2.4%	2215.5%
Botswana	3,716	2.7%	1.6%	-44.1%
USA	1,732	1.1%	0.8%	-35.8%
UK	941	0.7%	0.4%	-40.4%
eSwatini	884	0.2%	0.4%	79.8%
Australia	652	0.3%	0.3%	5.3%
Netherlands	622	0.2%	0.3%	34.1%
China incl. HK	443	0.3%	0.2%	-34.5%
Germany	384	0.4%	0.2%	-59.1%
Others in Top 10 Q2 2019:				
Namibia	46	0.5%	0.0%	-96.4%
Mozambique	40	0.4%	0.0%	-96.1%
All Free State Arrivals	229,140	8.6%	10.6%	-5.2%

Share of Free State Tourist Arrivals by Main Purpose Q2 2023

Free State	VFR	Holiday	Business Shopping	Business Traveller		MICE	Medical	Religion
Share Q2 2023	78.9%	1.2%	0.5%	2.0%	0.0%	1.8%	1.0%	1.6%
Basis Point Change vs. 2019	12.0%	-2.3%	-1.8%	1.0%	-7.29	1.2%	0.6%	0.9%





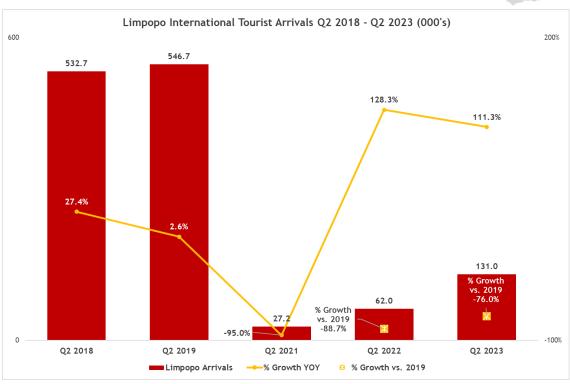


KwaZulu-Natal International Tourist Arrivals by Top 10 Source Markets Q2 2023

KwaZulu-Natal Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth 2023 vs. 2019
eSwatini	60,970	39.0%	41.3%	-22.2%
Zimbabwe	19,175	3.3%	13.0%	191.3%
Lesotho	11,286	5.4%	7.6%	4.2%
USA	7,827	5.7%	5.3%	-31.8%
UK	6,802	4.7%	4.6%	-28.6%
India	4,073	2.6%	2.8%	-23.2%
Germany	3,959	3.3%	2.7%	-40.2%
Australia	3,901	2.8%	2.6%	-30.9%
Botswana	2,901	8.6%	2.0%	-83.2%
France	2,863	3.0%	1.9%	-52.2%
All KwaZulu-Natal Arrivals	147,775	7.2%	6.8%	-26.5%

Share of KwaZulu-Natal Tourist Arrivals by Main Purpose Q2 2023

KwaZulu-Natal	VFR	Holiday	Business Shopping	Business Traveller		MICE	Medical	Religion
Share Q2 2023	50.4%	19.2%	11.5%	4.6%	1.8%	3.9%	0.4%	4.6%
Basis Point Change vs. 2019	1.9%	-5.59	8.2%	0.3%	-3.1%	-1.5%	0.2%	1.7%

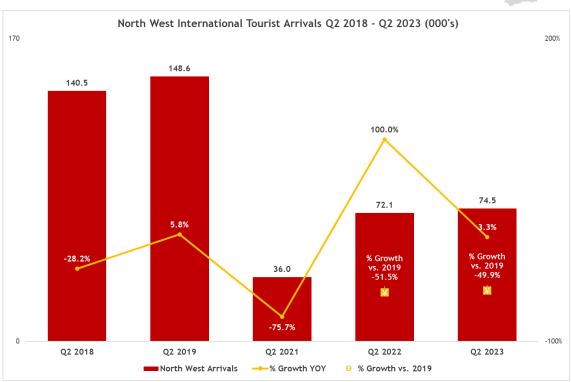


Limpopo International Tourist Arrivals by Top 10 Source Markets Q2 2023

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Limpopo Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth 2023 vs. 2019
Zimbabwe	77,345	81.4%	59.0%	-82.6%
Botswana	15,204	8.1%	11.6%	-65.8%
USA	7,701	2.6%	5.9%	-46.0%
Mozambique	4,490	0.9%	3.4%	-12.2%
UK	3,829	0.8%	2.9%	-15.8%
Germany	2,722	0.6%	2.1%	-20.1%
France	2,345	0.4%	1.8%	12.8%
eSwatini	2,176	0.2%	1.7%	121.3%
Australia	2,072	0.4%	1.6%	6.2%
Netherlands	1,565	0.3%	1.2%	-16.7%
Others in Top 10 Q2 2019:				
Lesotho	681	1.7%	0.5%	-92.8%
All Limpopo Arrivals	131,003	19.6%	6.0%	-76.0%

Share of Limpopo Tourist Arrivals by Main Purpose Q2 2023

Limpopo	VFR	Holiday	Business Shopping	Business Traveller		MICE	Medical	Religion
Share Q2 2023	29.0%	17.9%	25.0%	1.1%	20.4%	1.1%	0.5%	2.1%
Basis Point Change vs. 2019	17.4%	6.3%	3.6%	0.4%	-27.6%	0.5%	0.1%	-1.0%



North West International Tourist Arrivals by Top 10 Source Markets Q2 2023

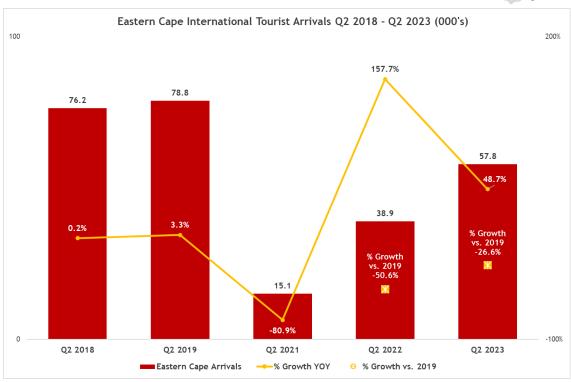
North West Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth 2023 vs. 2019	
Botswana	25,018	54.2%	33.6%	-68.9%	
Zimbabwe	13,759	4.6%	18.5%	103.4%	
Lesotho	7,269	13.9%	9.8%	-64.9%	
Mozambique	4,431	1.8%	6.0%	68.8%	
USA	3,773	3.2%	5.1%	-19.6%	
UK	2,382	2.5%	3.2%	-36.1%	
India	1,503	3.7%	2.0%	-72.5%	
Germany	1,484	1.3%	2.0%	-23.8%	
Namibia	1,451	1.1%	1.9%	-11.9%	
Australia	1,274	1.2%	1.7%	-30.7%	
Others in Top 10 Q2 2019:					
eSwatini	1,027	2.7%	1.4%	-74.2%	
All North West Arrivals	74,456	5.3%	3.4%	-49.9%	

Share of North West Tourist Arrivals by Main Purpose Q2 2023

North West	VFR	Holiday	Business Shopping	Business Traveller	Personal Shopping	MICE	Medical	Religion
Share Q2 2023	52.4%	23.3%	3.8%	5.7%	0.7%	4.9%	1.0%	1.0%
Basis Point Change vs. 2019	3.3%	6.5%	-11.7%	2.4%	-3.5%	1.5%	0.6%	-0.7%







Eastern Cape International Tourist Arrivals by Top 10 Source Markets Q2 2023

•				
Eastern Cape Top 10 Markets Q2 2023	Tourist Arrivals Q2 2023	% Share Q2 2019	% Share Q2 2023	% Growth 2023 vs. 2019
Zimbabwe	10,486	4.7%	18.1%	185.8%
UK	6,730	12.2%	11.6%	-30.0%
Germany	5,719	11.6%	9.9%	-37.5%
USA	4,937	10.2%	8.5%	-38.8%
India	2,868	2.0%	5.0%	82.9%
Australia	2,867	3.8%	5.0%	-5.2%
Netherlands	2,796	3.3%	4.8%	7.5%
France	2,519	3.4%	4.4%	-6.2%
Lesotho	2,510	12.7%	4.3%	-74.8%
Switzerland	1,385	2.3%	2.4%	-23.7%
Others in Top 10 Q2 2019:				
Italy	565	2.6%	1.0%	-72.6%
All Eastern Cape Arrivals	57,805	2.8%	2.7%	-26.6%

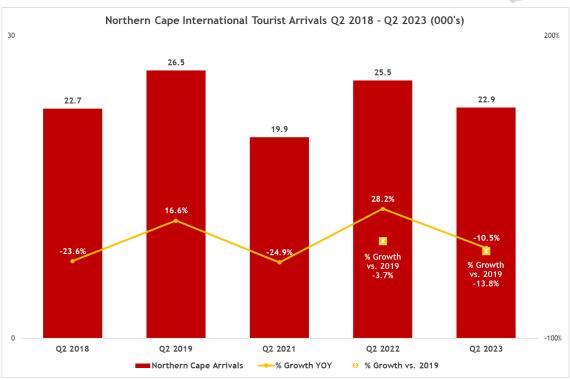
Share of Eastern Cape Tourist Arrivals by Main Purpose Q2 2023

Eastern Cape	VFR	Holiday	Business Shopping	Business Traveller		MICE	Medical	Religion
Share Q2 2023	36.4%	39.1%	1.5%	6.4%	0.2%	2.7%	0.1%	0.8%
Basis Point Change vs. 2019	9.1%	-7.2%	0.0%	1.8%	-1.9%	0.1%	0.0%	0.1%









Northern Cape International Tourist Arrivals by Top 10 Source Markets Q2 2023

Northern Cape Top 10 Markets	Tourist Arrivals	% Share	% Share	% Growth
Q2 2023	Q2 2023	Q2 2019	Q2 2023	2023 vs. 2019
Namibia	7,650	43.0%	33.5%	-32.9%
Zimbabwe	4,524	0.4%	19.8%	4282.0%
Lesotho	3,105	23.9%	13.6%	-50.9%
USA	866	5.8%	3.8%	-44.0%
Botswana	764	0.3%	3.3%	1007.8%
Australia	493	1.6%	2.2%	15.4%
Mozambique	483	0.0%	2.1%	n/a
UK	474	4.0%	2.1%	-55.8%
Bangladesh	467	1.1%	2.0%	63.5%
Malawi	401	0.0%	1.8%	n/a
Others in Top 10 Q2 2019:				
India	342	1.6%	1.5%	-18.5%
France	317	1.8%	1.4%	-33.4%
Netherlands	275	1.6%	1.2%	-36.3%
Germany	239	2.5%	1.0%	-63.8%
China incl. HK	112	2.1%	0.5%	-79.8%
All Northern Cape Arrivals	22,864	0.9%	1.1%	-13.8%

Share of Northern Cape Tourist Arrivals by Main Purpose O2 2023

Northern Cape	VFR	Holiday		Business Traveller		MICE	Medical	Religion
Share Q2 2023	55.3%	16.5%	0.9%	15.6%	2.3%	5.4%	0.0%	0.8%
Basis Point Change vs. 2019	16.0%	-6 <mark>.0%</mark>	-6 <mark>.5%</mark>	10.1%	-11.7	2.2%	-1.6	-0.5%



SUMMARY OF KEY FINDINGS



In the 2nd quarter of 2023, there was a total of

10.0 million overnight domestic trips.

This was +11.3% more than in Q2 2022 and an all-time high. Domestic trips were mainly for VFR purposes (45.9%), and increasingly for holiday purposes (27.6%). VFR surpassed Q2 2022 levels (37.8%) but did not reach Q2 2019 levels (70.1%). Holidays' share continues to strengthen.



Overnight domestic tourism generated a total of

ZAR 29.0

represented +18.6% growth over Q2 2022. This is an all-time high for the second quarter. Higher spend has also resulted in a much

higher average spend of ZAR 2,890 (+6.6% vs. Q2 2022) — also an all-time high for the second quarter.



The average duration of stay

for domestic trips was 3.8 nights and

represented a very slight increase over Q2 2022 (+6.6%). This comes on the back of a similar previous increase in Q2 2022 (+5.9% over Q2 2021).

Higher trip and tourist numbers resulted in

37.8 million bed nights, or +18.7% growth vs. Q2 2022.

Domestic trips reached a total of 10.0 million, and have outdone their 2022 levels, growing by +11.3%. Domestic trips have been growing consistently since Q2 2019 with this quarter's result being a clear all-time high. In fact, domestic trips are more than double what they were in Q2 2019 (+166.8%). Travel purpose continues to recover as well with VFR and holiday trips on the increase, accounting for 45.9% and 27.6% of all trips, respectively.

There were 9.4 million domestic tourists this quarter, representing a +9.5% growth over Q2 2022. This is in line with the 10.0 million trips recorded this quarter and their +11.3% growth vs. Q2 2022. It's also an all-time high, outdoing Q2 2022 results when 8.6 million domestic tourists were recorded, despite the +94.2% year-on-year growth shown then. The average number of trips remained relatively stable this quarter with 1.1 trips per tourist.

In line with the overall growth in trips this quarter, domestic spend grew by +18.6% over Q2 2022 to reach ZAR 29.0 billion. This is another all-time high since Q2 2022 when domestic spend reached ZAR 24.4 billion (+218.1% vs. Q2 2021). This result has also overtaken Q1 2023's ZAR 23.5 billion. The average spend for Q2 2023 was ZAR 2,890, having grown by +6.6% over Q2 2022. Average spend this quarter is therefore also an all-time high, albeit by a fairly small margin (ZAR 180).

Driven by a +11.3% growth in trips over Q2 2022, domestic bed nights reached 37.8 million, having grown by +18.7% over Q2 2022. This result is yet another all-time high since Q2 2022's 31.8 million. The average length of stay slightly increased vs. Q2 2022 and amounted to 3.8 nights or +6.6% growth. This is close to Q2 2019's 3.9 nights and comes on the back of a similar previous increase in Q2 2022 (+5.9% over Q2 2021).

Domestic day trips in Q2 2023 did not come close to their Q2 2022 levels and have lost a significant -24.2% to reach a total of 36.1 million. They however outdone their Q2 2019 levels, albeit by a small +3.2%. Hence the all-time highs of Q2 2015 & Q2 2022 remain (59.2 million & 47.6 million respectively). Travel purpose remained like Q2 2022, except for personal shopping which accounted for 16.2% of day trips compared to 27.4% in Q2 2022.

DOMESTIC TOURISM PERFORMANCE

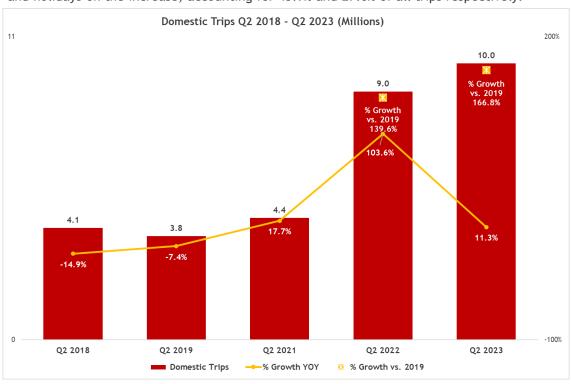


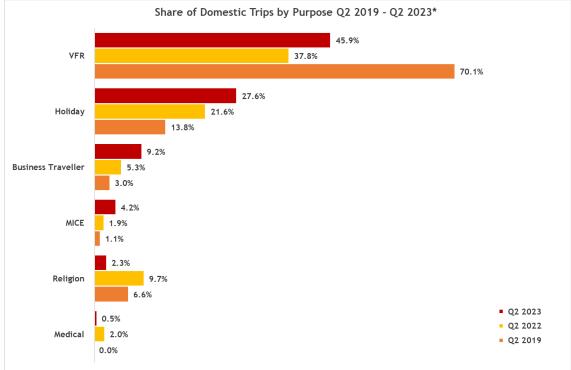


DAY TRIPS 36.1 MILLION -24.2% •

DAY TRIP SPEND ZAR 33.5 BILLION -18.7% ▼

Domestic trips reached a total of 10.0 million, and have outdone their 2022 levels, growing by +11.3% over Q2 2022. Domestic trips have been growing consistently since Q2 2019 with this quarter's result being a clear all-time high. In fact, domestic trips are more than double what they were in Q2 2019 (+166.8%). Travel purpose continues to recover as well with VFR and holidays on the increase, accounting for 45.9% and 27.6% of all trips respectively.





^{*}Personal & business shopping removed due to very low counts. Other removed for backchecking purposes.



Unlike previous quarters, this second quarter of 2023, domestic VFR travellers were split evenly between males (49.8%) and females (50.2%). Similarly to Q1 2023, almost half of them were single or have never been married (46.4%) but this is less so than in Q2 2022 (55.7%). Around a third of them were young (34.4%, 18-34 years) whereas previously in Q2 2022 18-34 year old's accounted for 40.2% of VFR. Around a third (31.6%) do not have children, and the large majority reported earning less than ZAR 5,000 (69.2%).

VFR Q2 2023

Education



Completed high school: 61.6%

Family Situation



No children: 31.6%

<u>Gender</u>



Male: 49.8%

Income



Less than or equal to R 5,000: 69.2%

<u>Marital Status</u>



Single/Never married: 46.4%

Age Group



18-34 years: 34.4%

Holiday tourists were less evenly split between males (55.4%) and females (44.6%) and were better educated with 32.0% having completed tertiary education. They were older, with over half being 35 years or older (51.9%). Naturally, more than half have dependent children and reported to earn more than ZAR 5,000 (56.8% & 53.1% respectively).

Holiday Q2 2023

Education



Completed tertiary: 32.0%

Family Situation



Dependent children: 56.8%

Gender



Female: 44.6%

Income



More than R 5,000: 53.1%

Marital Status

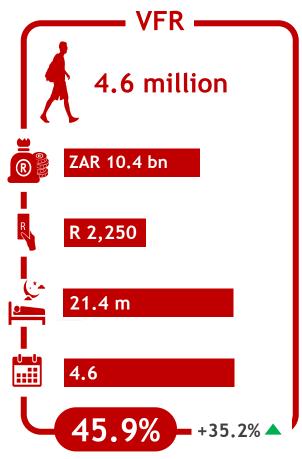


Married: 44.2%

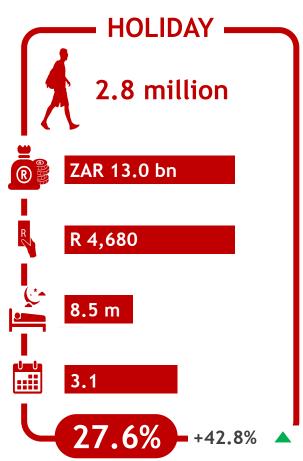
Age Group



35+ years: 51.9%

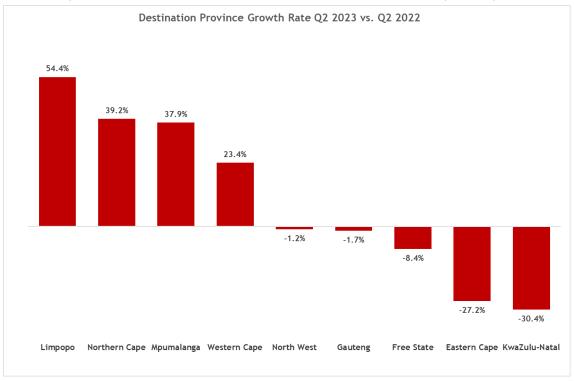


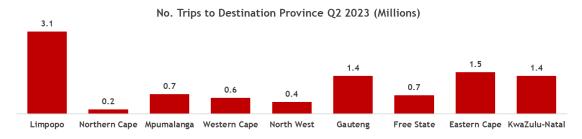
- Similarly to Q1 2023, in Q2 2023 there were 4.6 million VFR trips, this representing +35.2% growth over Q2 2022. Both Q1 & Q2 2023 are dissimilar from Q3 & Q4 2022 when VFR trips were fairly equal to their 2019 levels (-1.6% & +1.2% compared to Q3 & Q4 2019 respectively).
- VFR therefore continues to be the most popular reason for domestic trips and accounts for 45.9% of all trips, whereas in Q2 2022 it accounted for a much smaller share (37.8%).
- VFR-related spend was at ZAR 10.4 billion this quarter and has shown +52.5% growth over Q2 2022.
- VFR bed nights have grown by 67.3% over Q2 2022 to reach 21.4 million.
- VFR length of stay has increased considerably reaching 4.6 nights (+23.8% vs. Q2 2022). The average stay has therefore grown by almost an entire night since in Q2 2022 it was 3.8 nights.



- This quarter, holiday trips continued to outpace 2022 levels and have reached 2.8 million, with a growth of +42.8% growth over Q2 2022. This improves on the positive trend already spotted in Q1 2023 & Q4 2022 when holidays grew by +116.5% & +31.5% vs. Q1 & Q4 2019 respectively.
- This 2nd quarter, holidays accounted for 27.6% of all domestic trips — more than Q2 2022's 21.6% share.
- Holiday spend has grown by +19.8% over Q2 2022 although holiday trips have grown by +42.8% over Q2 2022.
- Average spend equaled ZAR 4,680 this quarter, having lost ZAR 900 and having thus shown negative growth over Q2 2022 (-16.1%).
- The growth in trip numbers has not been matched by bed night growth (+9.6% vs. Q2 2022).
- Length of stay has therefore declined slightly by -23.3% over Q2 2022, to reach 3.1 nights.

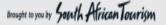
This quarter, both main destination and source province growth patterns are mixed when compared to Q2 2022, with some provinces having shown growth while others have experienced declines over Q2 2022. With the exception of Mpumalanga, Limpopo, and the Northern Cape, all provinces that have grown as a main destination have declined as a source. Mpumalanga, has grown as a main destination (+37.9%) as well as a source (+135.5%) compared to Q2 2022 and is therefore an exception. Limpopo has grown the most as a main destination (+54.4%) but only slightly (+10.6%) as a source, both over Q2 2022. Destination growth was also evidenced in the Northern and Western Cape (+39.2% & 23.4% vs. Q2 2022 respectively). Kwa-Zulu Natal declined the most as a main destination, followed by the Eastern Cape, and the Free State (-30.4%, -27.2% & -8.4% vs. Q2 2022 respectively).



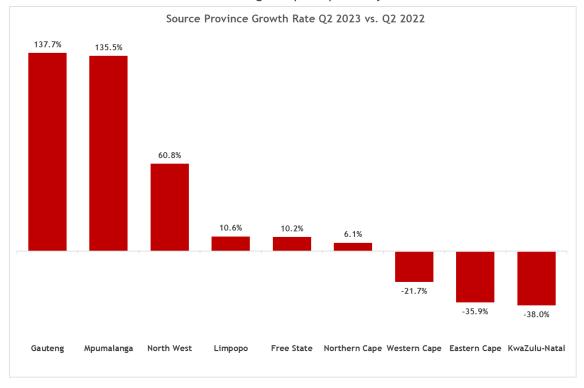


No. of Trips to Main Destination Province Q2 2021 - Q2 2023

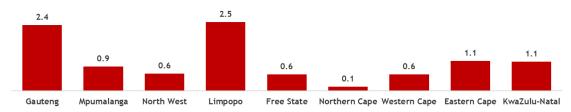
No. of Trips to Destination	Limpopo	Northern Cape	Mpumalanga	Western Cape	North West	Gauteng	Free State	Eastern Cape	KwaZulu- Natal
Q2 2021	131,621	97,002	449,875	72,004	498,951	291,190	189,946	1,988,456	704,196
Q2 2022	1,978,573	119,211	525,954	479,615	448,984	1,426,861	748,818	2,128,975	2,020,671
Q2 2023	3,055,162	165,950	725,218	591,646	443,778	1,401,955	685,916	1,549,840	1,406,441



Source province growth was essentially the same and the highest by far for Gauteng and Mpumalanga (+137.7% & +135.5% vs. Q2 2022). Next in line was North West with +60.8% growth, followed, after a large drop, by Limpopo, Free State, and the Northern Cape (+60.8%, +10.6%, +10.2%, & +6.1% respectively). KwaZulu-Natal experienced the largest drop in terms of being a source province, followed closely by the Eastern Cape, and then by some margin the Western Cape (-38.0%, -35.9%, & -21.7%). Despite the sharp drop in domestic overnight trips by KwaZulu-Natal residents, KwaZulu-Natal has remained one of the top four contributors to trip source, coming in third and in a tie with the Eastern Cape (1.1 million trips). The largest source provinces this quarter were Limpopo and Gauteng with 2.5 and 2.4 million domestic overnight trips respectively.

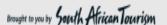


No. Trips from Source Province Q2 2023 (Millions)

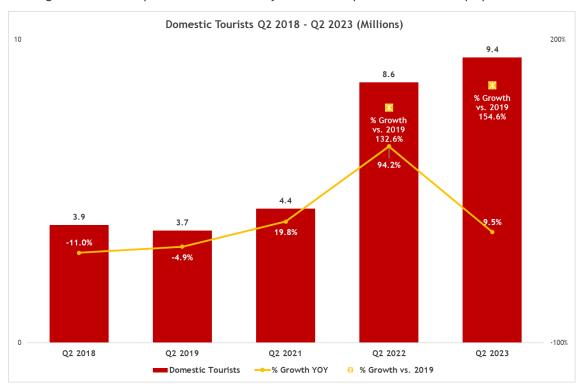


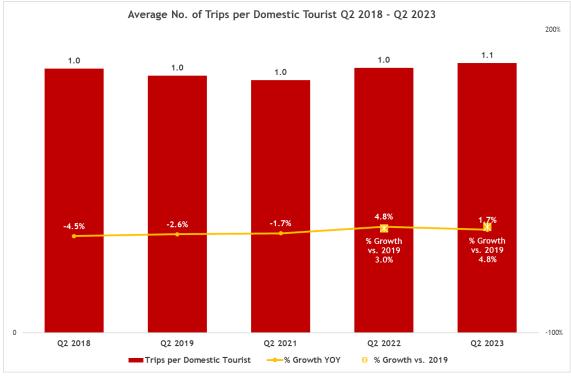
No. of Trips from Source Province Q2 2021 - Q2 2023

No. of Trips from Source	Gauteng	Mpumalanga	North West	Limpopo	Free State	Northern Cape	Western Cape	Eastern Cape	KwaZulu- Natal
Q2 2021	542,720	527,544	511,440	0	115,054	26,844	89,616	2,081,290	528,733
Q2 2022	1,021,076	378,334	392,422	2,302,781	545,911	135,622	776,229	1,715,680	1,736,341
Q2 2023	2,427,414	891,018	631,191	2,546,364	601,700	143,956	607,511	1,099,481	1,077,269



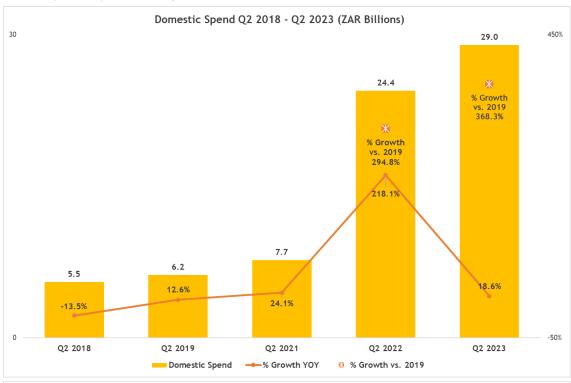
There were 9.4 million domestic tourists this quarter, representing a +9.5% growth over Q2 2022. This is in line with the 10.0 million trips recorded this quarter and their +11.3% growth vs. Q2 2022. It's also an all-time high, outdoing Q2 2022 results when 8.6 million domestic tourists were recorded, despite the +94.2% year-on-year growth shown then. The average number of trips remained relatively stable this quarter with 1.1 trips per tourist.

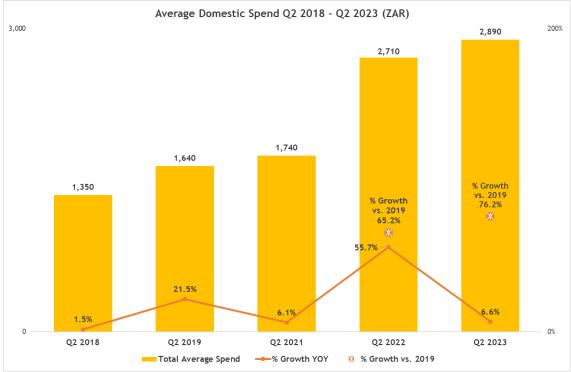






In line with the overall growth in trips this quarter, domestic spend has also grown by +18.6% over Q2 2022 to reach ZAR 29.0 billion. This is another all-time high since Q2 2022 when domestic spend reached ZAR 24.4 billion (+218.1% vs. Q2 2021). This result has also overtaken Q1 2023's ZAR 23.5 billion. The average spend for Q2 2023 was ZAR 2,890, having grown by +6.6% over Q2 2022. Average spend this quarter is therefore also an all-time high, albeit by a fairly small margin (ZAR 180).





Average Domestic Spend by Main Purpose Q2 2019 - Q2 2023 (ZAR)

Average Domestic Spend	Q2 2019	Q2 2022	Q2 2023	% Growth 2023 vs. 2022
VFR	1,000	1,990	2,250	13.1%
Holiday	3,450	5,580	4,680	-16.1%
MICE	3,560	9,410	1,360	-85.5%
Domestic Trips	1,640	2,710	2,890	6.6%

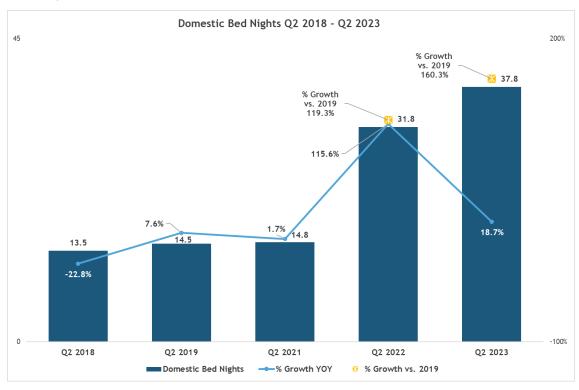
Domestic Spend by Main Purpose Q2 2023 vs. Q2 2022 (ZAR Billions & Shares)

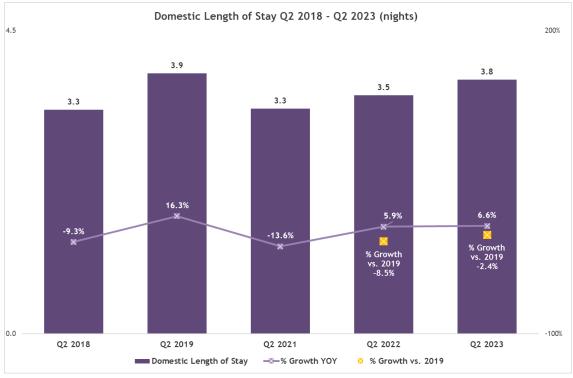
Main Purpose	Q2 2022	Q2 2023	% Share Q2 2022	% Share Q2 2023
VFR	6.8	10.4	27.8%	35.8%
Holiday	10.8	13.0	44.3%	44.8%
MICE	1.6	0.6	6.5%	2.0%
Business Traveller	0.8	3.0	3.1%	10.4%
Personal Shopping	0.7	0.3	2.7%	1.0%
Religion	1.2	0.3	4.8%	1.0%

Domestic Spend by Expenditure Category Q2 2019 - Q2 2023 (ZAR Billions)

Expenditure Category	Q2 2019	Q2 2022	Q2 2023	% Growth 2023 vs. 2019
xpenditure Category	2.6	5.2	6.2	18.9%
Transport	1.0	3.5	4.9	40.4%
Food and Beverages	1.2	4.2	3.3	-19.7%
Accommodation	1.1	1.7	1.4	-20.5%
Personal Shopping	0.2	0.3	0.5	63.0%
Leisure	0.1	0.2	0.2	28.3%

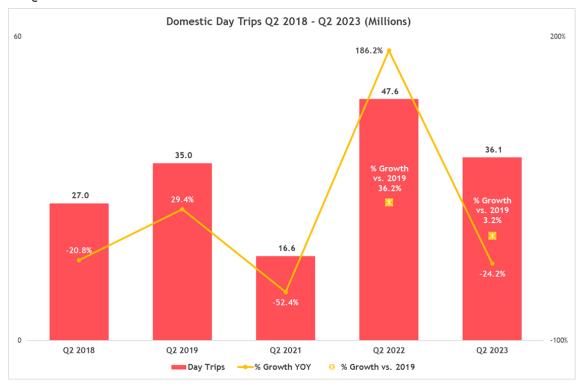
Driven by a +11.3% growth in trips over Q2 2022, domestic bed nights reached 37.8 million, having grown by +18.7% over Q2 2022. This result is yet another all-time high since Q2 2022's 31.8 million. Length of stay has slightly increased vs. Q2 2022 and amounted to 3.8 nights or +6.6% growth. This is close to Q2 2019's 3.9 nights and comes on the back of a similar previous increase in Q2 2022 (+5.9% over Q2 2021).







Domestic day trips in Q2 2023 did not come close to their Q2 2022 levels and have lost significantly by -24.2% since then to reach a total of 36.1 million. They have however outdone their Q2 2019 levels, albeit by a small +3.2%. Hence the all-time highs experienced in Q2 2015 and Q2 2022 remain (59.2 million and 47.6 million respectively). In terms of travel purpose, things are relatively similar to what they were in Q2 2022, with the exception of personal shopping which accounted for 16.2% of day trips compared to 27.4% in Q2 2022.



Domestic Day Trips by Purpose (Actual Millions, Share & Growth)

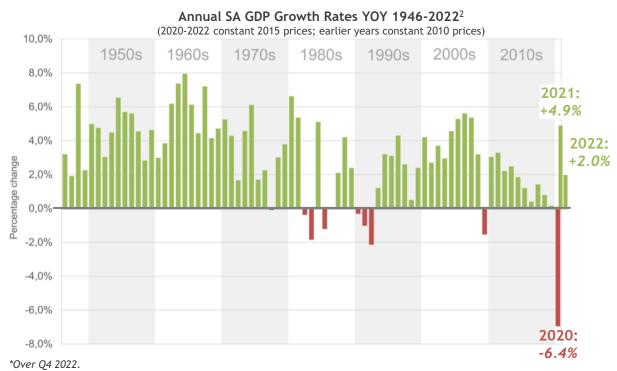
Q2 2022 (growth vs. 2019) Q2 2023 (growth vs. 2022) PERSONAL SHOPPING PERSONAL SHOPPING 13.0m 27.4% 5.8m 16.2% +34.0% -55.2% **BUSINESS BUSINESS** 5.6m 11.8% 5.2m 14.5% +27.7% +2.2% **HOLIDAY** HOLIDAY 7.1m 19.6% 6.8m 14.2% +60.4% +4.6% **RELIGIOUS RELIGIOUS** 1.3m 2.7% 0.6m 1.7% -33.3% -52.1%



THE SOUTH AFRICAN ECONOMY

The Covid-19 pandemic had a tremendous and devastating impact on SA's economy. The pandemic's impact was mostly felt in 2020 when restrictions, lockdowns, and travel bans were at their highest, resulting in an overall -6.4% year-on-year negative growth for 2020.² This was the biggest fall in economic activity South Africa had known since World War II, and it took SA's economy back to its 2008 size (see overleaf³). After a dismal 2020, economic activity increased by +4.9% in 2021 despite the KwaZulu-Natal riots which caused much disruption, destruction as well as 300 deaths. 2022 began with continued growth but, in Q2 2022, GDP decreased by -0.8%, shrinking it to less than what it was prior to the pandemic. Load shedding and devastating floods in KwaZulu-Natal in April 2022 (440 deaths, 4,000 homes destroyed, 8,000 homes damaged), contributed to the decline. Q3 of 2022, being the first without lockdowns, showed positive growth of +1.8%, letting SA's economy surpass pre-Covid-19 levels and recording an all-time quarterly high of ZAR 1,161 billion. However, 2022's Q4 resulted in negative growth of -1.32overall then, South Africa's economy grew by +2.0% year-on-year.¹¹

Despite contracting in Q4 2022 (-1.1%), in the first quarter of 2023, South Africa's economy has grown by a very small margin of 0.4%. As can be seen overleaf, eight of the ten industries recorded growth in the first quarter, with manufacturing and finance, real estate & business services being the largest positive contributors to the growth. Agriculture, forestry & fishing was the only industry to show a dramatic negative drop (-12.3%), whilst electricity, gas & water was fairly stagnant (-1.0%). Loadshedding continues to damage SA's economy in general as well as the tourism sector. As shared by Nedbank's economist Liandra da Silva at the FEDHASA's 'Talking Energy Summit' on 26th June 2023, by the end of Q2 2023, SA has experienced 30% more loadshedding than in 2022 overall. In 157 out of 185 days in the first six months of 2023, there was loadshedding (stage 4 on average). "Load shedding hurts output and drives up costs" said Da Silva, further stressing that the winter season has thus far been better than expected, but the shortage remains in the long-term. 5



² Statistical Releases P0441: Gross Domestic Product, March 2021 - March 2023.

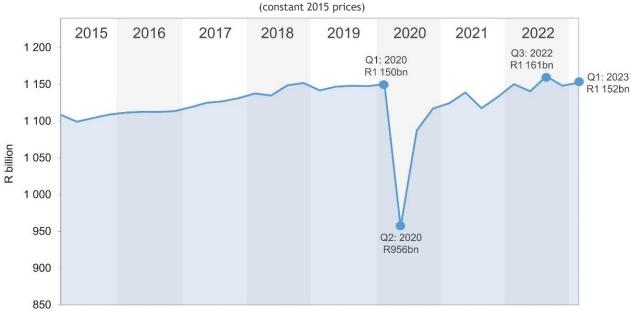
³ Trading Economics, https://tradingeconomics.com/south-africa/gdp.

⁴ 'South African Economy Expands by 0.4%' Statistics SA, 6th June 2023.

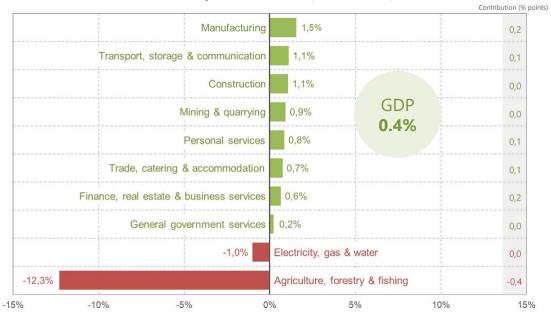
⁵ Schultz, C. (2023): 'Loadshedding Continues to Hurt Sector', Tourism Update, 27th June 2023.

⁶ Statistical Release P0441: Gross Domestic Product, 1st Quarter 2023, Statistics SA, 6th June 2023.





SA GDP Industry Growth Rates Q1 2023 vs. Q4 2022⁶



^{*}Over Q4 2022.

 $^{^{\}rm 4}$ 'South African Economy Expands by 0.4%' Statistics SA, $6^{\rm th}$ June 2023.

⁶ Statistical Release P0441: Gross Domestic Product, 1st Quarter 2023, Statistics SA, 6th June 2023.





INTERNATIONAL TOURIST ARRIVALS						
1	Q2 2021	Q2 2022	Q2 2023	% CROWTH		
Africa	473 092	-	-	% GROWTH		
Botswana	23 875	936 188 60 410	1 532 460 84 350	63,7% 39,6%		
Lesotho	92 595	190 604	290 534	52,4%		
Malawi	12 848	24 321	28 320	16,4%		
Mozambique	137 279	195 412	313 234	60,3%		
Namibia	23 128	32 675	39 812	21,8%		
Swaziland	45 466	94 066	179 742	91,1%		
Zambia	16 633	27 586	35 061	27,1%		
Zimbabwe	101 501	267 162	504 749	88,9%		
Angola	2 006	7 747	8 947	15,5%		
Dem Rep of Congo	2 846	4 554	4 702	3,2%		
Ethiopia	697	1 190	1 402	17,8%		
Ghana	1 835	3 786	2 789	-26,3%		
Kenya	1 628	4 907	9 467	92,9%		
Nigeria	2 991	3 366	4 241	26,0%		
Tanzania	3 306	6 110	8 079	32,2%		
Uganda	1 055	2 042	2 616	28,1%		
Other Africa	3 403	10 250	14 415	40,6%		
Asia	10 333	30 002	55 925	86,4%		
China including Hong Kong	2 291	2 612	10 238	292,0%		
India	3 166	15 074	25 313	67,9%		
Japan	282	1 419	3 057	115,4%		
Malaysia	217	730	1 610	120,5%		
Singapore	42	696	2 336	235,6%		
Rep of Korea	260	1049	2099	100,1%		
Other Asia	4 075	8 422	11 272	33,8%		
Australasia	918	13 956	26 259	88,2%		
Australia	740	11 901	21 238	78,5%		
New Zealand	176	2 040	4 913	140,8%		
Other Australasia	2	15	108	620,0%		
CENTRAL & SOUTH AMERICA	1 893	6 588	8 870	34,6%		
Argentina	151	515	679	31,8%		
Brazil	979	3 476	4 175	20,1%		
Chile	48	231	359	55,4%		
Other Central & South America	715	2 366	3 657	54,6%		
Europe	29 075	163 403	207 092	26,7%		
Austria	419	2 211	2 597	17,5%		
Belgium	1 159	5 998	7 340	22,4%		
Denmark	435	2 840	2 716	-4,4%		
Finland	181	765	1 126	47,2%		
France	2 962	16 012	24 990	56,1%		
Germany	4 136	25 905	32 716	26,3%		
Ireland	502	4 355	6 162	41,5%		
Italy	1 231	5 512	8 834	60,3%		
Netherlands	2590	14 4 16	19914			
Norway	211	1 553	1 885	21,4%		
Portugal	1 206	4 021	4 854	20,7%		
Russian Fed	2573	2340	5293			
Spain	979	4 636	6 098	31,5%		
Sweden	566	2 824	3 261	15,5%		
Switzerland	1 100	5 885	6 925	17,7%		
Turkey	550	2 149	3 093	43,9%		
uĸ	5 548	55 715	60 575	8,7%		
Other Europe	2 727	6 266	8 713	47,3%		
Middle East	2 727	7 819	11 422	46,1%		
United Arab Emirates	64	444	1 298	192,3%		
Other Middle East	2 663	7 375	10 124	37,3%		
North America	20 279	77 803	106 591	37,0%		
Canada	1 035	7 483	11 237	50,2%		
USA	19 244	70 320	95 354	35,6%		
UNSPECIFIED	1 008	2 429	3 270	34,6%		
TOTAL	539 325	1 238 188	1 951 889	58,1%		





-	TOTAL EODEIGN DIDECT SDEND	TOTAL FOREIGN DIRECT SPEND (TFDS) BY COUNTRY								
	Q2 2021	Q2 2022	Q3 2022	% GROWTH						
AFRICA	R1 643 769 204	R4 293 019 337	R12 145 315 189	182,91%						
Botswana	R43 719 645	R215 967 458	R288 422 745	33,55%						
Lesotho	R310 635 191	R517 837 061	R686 882 051	32,64%						
Malawi	R52 619 097	R207 585 859	R1 205 896 135	480,91%						
Mozambique	R569 881 656	R641 026 787	R873 409 235	36,25%						
Namibia	R106 033 078	R229 139 322	R310 071 501	35,32%						
Swaziland	R83 549 751	R174 193 607	R297 417 471	70,74%						
Zambia	R44 543 243	R216 713 336	R951 923 768	339,25%						
Zimbabwe	R213 913 894	R1 247 032 575	R6 337 286 040	408,19%						
Angola	R37 538 395	R188 934 192	R251 846 250	33,30%						
DRC	R23 852 028	R142 820 414	R123 363 761	-13,62%						
Ethiopia	R16 295 928	R17 959 749	R16 673 224	-7,16%						
Ghana	R9 098 965	R63 289 914	R108 056 032	70,73%						
Kenya	R17 593 224	R108 491 072	R195 739 430	80,42%						
Nigeria	R56 513 325	R61 269 198	R111 532 209	82,04%						
Tanzania	R12 214 615	R69 514 008	R93 166 378	34,03%						
Uganda	R6 379 587	R41 107 687	R44 615 561	8,53%						
Other Africa	R39 387 584	R150 137 097	R249 013 399	65,86%						
ASIA	R234 031 019	R400 554 400	R1 229 354 616	206,91%						
China including Hong Kong	R66 594 717	R55 844 323	R346 899 311	521,19%						
India	R88 949 459	R197 475 145	R479 382 567	142,76%						
Japan	R13 530 211	R24 738 321	R69 542 520	181,11%						
Malaysia	R2 674 108	R15 701 369	R22 372 498	42,49%						
Singapore	R3 843 469	R7 442 744	R43 861 168	489,31%						
South Korea	R7 792 991	R19 815 578	R59 547 086	200,51%						
Other Asia	R50 646 063	R79 536 920	R207 749 465	161,20%						
AUSTRALASIA	R131 924 503	R299 600 373	R614 551 427	105,12%						
Australia	R107 224 978	R250 033 651	R494 052 323	97,59%						
New Zealand	R24 699 525 R0	R49 117 583 R449 139	R117 077 376 R3 421 728	138,36%						
Other Australasia CENTRAL & SOUTH AMERICA	R37 787 608	R143 083 397	R182 915 375	661,84% 27,84 %						
Argentina	R9 736 208	R18 089 012	R20 690 993	14,38%						
Brazil	R14 159 301	R83 032 080	R111 375 585	34,14%						
Chile	R4 494 216	R6 076 870	R7 593 616	24,96%						
Other Central & South America	R9 397 882	R35 885 436	R43 255 181	20,54%						
EUROPE	R1 110 065 964	R3 413 615 517	R5 671 305 657	66,14%						
Austria	R19 577 525	R45 253 893	R95 162 743	110,29%						
Belgium	R31 954 661	R106 703 294	R184 516 478	72,92%						
Denmark	R22 387 912	R71 934 504	R90 557 591	25,89%						
Finland	R5 246 762	R19 903 455	R39 304 505	97,48%						
France	R86 027 517	R341 160 378	R714 035 539	109,30%						
Germany	R210 107 553	R558 208 606	R985 072 787	76,47%						
Ireland	R18 102 540	R84 999 660	R129 785 313	52,69%						
Italy	R38 653 748	R113 472 180	R187 545 419	65,28%						
Netherlands	R100 636 855	R336 621 830	R525 150 128	56,01%						
Norway	R20 110 622	R25 107 917	R53 762 893	114,13%						
Portugal	R22 150 032	R67 854 281	R131 360 134	93,59%						
Russian Fed	R17 548 997	R59 442 695	R167 494 334	181,77%						
Spain	R14 280 811	R90 784 620	R167 274 205	84,25%						
Sweden	R27 758 121	R57 717 154	R82 634 943	43,17%						
Switzerland	R43 065 163	R163 732 633	R215 838 638	31,82%						
Turkey	R47 014 647	R36 334 562	R94 235 254	159,35%						
UK	R347 907 837	R1 108 621 537	R1 627 711 333	46,82%						
Other Europe	R37 534 661	R125 762 319	R179 863 420	43,02%						
MIDDLE EAST	R46 362 629	R198 285 473	R360 507 157	81,81%						
UAE	R3 714 066	R22 481 013	R17 390 642	-22,64%						
Other Middle East	R42 648 562	R175 804 460	R343 116 515	95,17%						
NORTH AMERICA	R322 971 855	R2 396 845 302	R2 298 472 654	-4,10%						
Canada	R53 072 516	R222 448 446	R283 554 120	27,47%						
USA 	R269 899 340	R2 174 396 856	R2 014 790 833	-7,34%						
Other North American	R0	R0	R127 700							
TOTAL	R3 526 912 781	R11 145 003 800	R22 502 422 074	101,91%						

	20.000	AVERAGE SPEND		~ ~~~			
AFRICA	Q2 2021	Q2 2022	Q3 2022	% GROWTH			
AFRICA Botswana	R3 800 R1 900	R4 700 R3 700	R8 300 R3 600	76,6% -2,7%			
Lesotho	R3 400	R3 700 R2 800	R2 600	-7,1%			
Malawi	R4 900	R8 500	R43 200	408,2%			
Mozambique	R4 300	R3 300	R2 900	-12,1%			
Namibia	R5 100	R7 000	R7 900	12,9%			
eSwatini	R1 800	R1 800	R1 700	-5,6%			
Zambia	R3 000	R7 800	R27 200	248,7%			
Zimbabwe	R2 700	R4 600	R12 800	178,3%			
Angola	R19 600	R28 200	R33 200	17,7%			
DRC	R26 400	R35 900	R30 100	-16,2%			
Ethiopia	R19 400	R17 400	R13 300	-23,6%			
Ghana	R13 800	R17 300	R42 500	145,7%			
Kenya	R15 900	R24 300	R23 400	-3,7%			
Nigeria	R22 100	R21 700	R30 700	41,5%			
Tanzania	R14 000	R19 800	R19 500	-1,5%			
Uganda	R15 500	R22 100	R18 500	-16,3%			
Other Africa	R16 900	R18 900	R22 900	21,2%			
ASIA	R22 200	R17 400	R25 800	48,3%			
China including Hong Kong	R17 800	R31 500	R36 600	16,2%			
India	R26 300	R15 200	R21 300	40,1%			
Japan	R16 600	R18 400	R24 000	30,4%			
Malaysia	R11 200	R23 300	R17 400	-25,3%			
Singapore	R18 800	R11 200	R19 100	70,5%			
South Korea	R13 700	R23 100	R29 100	26,0%			
Other Asia	R32 100	R17 000	R28 900	70,0%			
AUSTRALASIA	R20 000	R22 200	R24 700	11,3%			
Australia	R19 200	R21 700	R24 600	13,4%			
New Zealand	R25 000	R25 000	R24 600	-1,6%			
Other Australia CENTRAL & SOUTH AMERICA	R0 R16 200	R40 800 R27 300	R79 600 R27 200	95,1% - 0,4 %			
Argentina	R17 400	R38 400	R32 300	-15,9%			
Brazil	R14 400	R28 300	R30 500	7,8%			
Chile	R16 600	R29 600	R22 000	-25,7%			
Other Central & South America	R17 900	R22 000	R20 700	-5,9%			
EUROPE	R19 200	R22 600	R30 600	35,4%			
Austria	R23 600	R21 700	R39 900	83,9%			
Belgium	R16 100	R19 000	R27 900	46,8%			
Denmark	R17 700	R26 200	R34 900	33,2%			
Finland	R13 900	R27 600	R37 100	34,4%			
France	R16 400	R23 400	R32 500	38,9%			
Germany	R18 600	R23 100	R33 500	45,0%			
Ireland	R19 100	R20 700	R33 500	61,8%			
Italy	R14 600	R22 000	R23 100	5,0%			
The Netherlands	R20 800	R25 500	R30 100	18,0%			
Norway	R25 000	R18 000	R30 800	71,1%			
Portugal	R18 800	R29 600	R44 900	51,7%			
Russian Federation	R24 100	R27 900	R34 300	22,9%			
Spain	R15 600	R21 100	R29 700	40,8%			
Sweden	R18 100	R22 200	R27 000	21,6%			
Switzerland 	R21 700	R29 800	R34 500	15,8%			
Turkey 	R55 900	R18 600	R33 500	80,1%			
Uk	R18 800	R20 800	R28 300	36,1%			
Other Europe	R19 200	R24 800	R26 500	6,9%			
MIDDLE EAST	R22 200	R29 500	R35 400	20,0%			
United Arab Emirates	R15 300	R53 500	R14 300	-73,3% -77,3%			
Other Middle East	R23 100	R27 900	R38 300	37,3%			
NORTH AMERICA	R20 600	R32 400	R33 200	2,5% -13,6%			
Canada USA	R21 200 R20 500	R31 600 R32 500	R27 300 R34 200	5,2%			
Other North America	R20 300	R0	R42 600	J, Z/0			
o and an America	,v	10	I 12 000				



TFDS BY PURPOSE OF VISIST							
	Q2 2021	Q2 2021					
Holiday	1322077900	3745927806	5650450493				
Personal Shopping	133842064	193643111	773366823				
Business Shopping	342512268	739464485	4978260143				
Business Traveller	209403181	962799430	1979345473				
MICE	51364210	659813783	1077861264				
Medical	58324151	230985262	363566982				
VFR	923600602	3499850581	5881679153				
Religion	18029576	35622888	123904038				





	BED NIGHTS BY COUNTRY							
	Q2 2021	Q2 2022	Q2 2023	% GROWTH				
AFRICA	3 876 094	10 155 155	19 438 534	91,4%				
Botswana	97 613	293 917	363 704	23,7%				
Lesotho	1 301 472	3 335 322	3 917 941	17,5%				
Malawi	128 001	275 228	373 141	35,6%				
Mozambique	872 112	1 466 939	3 175 917	116,5%				
Namibia	189 807	540 746	464 248	-14,1%				
eSwatini	200 509	789 424	1 649 696	109,0%				
Zambia	148 434	342 558	362 620	5,9%				
Zimbabwe	639 841	2 503 842	8 427 030	236,6%				
Angola	22 756	100 133	114 869	14,7%				
DRC	18 065	63 173	66 395	5,1%				
Ethiopia	51 187	13 232	20 038	51,4%				
Ghana	9 263	60 341	31 085	-48,5%				
Kenya	34 402	48 815	121 479	148,9%				
Nigeria Nigeria	103 127	51 723	59 593	15,2%				
Tanzania	11 980	64 494	84 885	31,6%				
Uganda	14 180	48 973	34 992	-28,5%				
Other Africa	33 346	156 295	170 901	9,3%				
ASIA	442 529	443 062	861 443	94,4%				
China including Hong Kong	95 746	38 628	197 266	410,7%				
India	229 003	214 217	395 241	84,5%				
			39 162					
Japan Malausia	10 804	17 636 23 718		122,1%				
Malaysia	4 515		29 984	26,4%				
Singapore	3 387	7 111	17 820	150,6%				
South Korea	6 804	32 398	39 385	21,6%				
Other Asia	92 270	109 354	142 586	30,4%				
AUSTRALASIA	90 221	243 629	408 539	67,7%				
Australia	72 310	191 260	321 643	68,2%				
New Zealand	17 911	52 106	84 457	62,1%				
Other Australia	-	263	2 439	827,2%				
CENTRAL & SOUTH AMERICA	33 340	104 420	112 431	7,7%				
Argentina	8 961	9 753	10 419	6,8%				
Brazil	14 133	58 215	59 321	1,9%				
Chile	3 692	4 598	5 997	30,4%				
Other Central & South America	6 554	31 853	36 694	15,2%				
EUROPE	951 240	2 879 328	3 308 359	14,9%				
Austria	13 594	41 475	54 446	31,3%				
Belgium	30 264	116 307	129 114	11,0%				
Denmark	18 797	51 986	47 052	-9,5%				
Finland	4 185	18 827	24 734	31,4%				
France	81 299	314 233	511 555	62,8%				
Germany	192 501	454 791	588 782	29,5%				
Ireland	13 214	65 322	69 970	7,1%				
Italy	41 702	115 471	121 303	5,1%				
The Netherlands	83 060	307 336	302 257	-1,7%				
Norway	15 340	24 848	29 945	20,5%				
Portugal	20 998	41 744	47 733	14,3%				
Russian Federation	11 496	47 757	92 608	93,9%				
Spain	11 896	76 619	78 228	2,1%				
Sweden	28 486	51 143	52 175	2,0%				
Switzerland	31 020	107 167	112 470	4,9%				
Turkey	27 283	42 103	50 779	20,6%				
Uk	27 263 280 568	42 103 876 369	872 536	-0,4%				
Other Europe	45 537			-0,4% -2,5%				
MIDDLE EAST	29 382	125 828 126 397	122 670 258 118	104,2%				
United Arab Emirates	3 134	9 177	10 268	104,2%				
Other Middle East	26 248		247 850	•				
		117 220		111,4%				
NORTH AMERICA	225 123	1 323 813	1 096 458	-17,2%				
Canada	44 517	156 214	151 364	-3,1%				
USA Other North America	180 606	1 167 599	945 025	-19,1%				
Other North America	- E 4 47 020	4E 27E 904	69 25 483 882	66,8%				
TOTAL	5 647 928	15 275 804	23 403 08Z	00,0%				

AVEDACE I ENCTLI OF STAY BY COUNTRY								
	AVERAGE LENGTH OF STAY BY COUNTRY Q2 2021 Q2 2022 Q2 2023 % G							
AFRICA	Q2 2021 9,0	10,9	Q2 2023 12,8	% GROWTH 16,8%				
Botswana	4,4	4,9	4,3	-11,5%				
Lesotho	14,1	17,5	13,5	-23,0%				
Malawi	12,0	11,3	13,2	16,5%				
Mozambique	6,4	7,5	10,1	35,1%				
Namibia	9,0	16,6	11,7	-29,6%				
eSwatini	4,4	8,4	9,2	9,3%				
Zambia	10,1	12,4	10,3	-16,7%				
Zimbabwe	8,3	9,4	16,7	78,1%				
Angola	11,8	14,8	15,1	2,0%				
DRC	19,6	15,7	16,2	2,8%				
Ethiopia	61,1	12,7	15,9	25,8%				
Ghana	14,1	16,6	11,9	-28,3%				
Kenya	26,0	10,8	14,4	33,4%				
Nigeria	40,3	18,3	16,3	-11,1%				
Tanzania	13,8	18,2	17,7	-2,6%				
Uganda	33,6	26,4	14,5	-45,3%				
Other Africa	14,2	19,6	15,6	-20,3%				
ASIA	41,1	19,1	18,0	-6,2%				
China including Hong Kong	25,5	21,7	20,7	-4,7%				
India	63,6	16,4	17,5	6,4%				
Japan	13,3	13,1	13,5	2,8%				
Malaysia	18,9	35,3	23,2	-34,1%				
Singapore	16,4	10,5	7,7	-26,1%				
South Korea	12,0	37,2	19,2	-48,4%				
Other Asia	58,0	23,0	19,6	-14,7%				
AUSTRALASIA	13,7	18,0	16,2	-10,2%				
Australia	13,0	16,5	15,7	-4,9%				
New Zealand	18,1	26,6	17,7	-33,4%				
Other Australia	0,0	23,9	56,7	137,2%				
CENTRAL & SOUTH AMERICA	14,2	19,9	16,7	-16,2%				
Argentina	16,0	20,3	16,2	-20,1%				
Brazil	14,4	19,9	16,2	-18,3%				
Chile	13,7	22,4	17,4	-22,6%				
Other Central & South America	12,2	19,6	17,5	-10,4%				
EUROPE	16,4	19,0	17,8	-6,4%				
Austria	15,9	20,0	22,6	13,5%				
Belgium	15,3	20,8	19,5	-6,2%				
Denmark	14,6	19,0	18,1	-4,5%				
Finland	11,1	26,2	23,3	-10,9%				
France	15,5	21,5	23,2	7,8%				
Germany	17,0	18,8	19,9	6,1%				
Ireland	13,9	15,9	18,0	13,4%				
Italy	15,8	22,3	14,8	-33,6%				
The Netherlands	17,2	23,3	17,3	-25,8%				
Norway	19,1	17,3	17,1	-1,2%				
Portugal	17,9	18,2	16,3	-10,6%				
Russian Federation	15,8	22,4	18,9	-15,5%				
Spain	12,9	17,8	13,9	-22,1%				
Sweden	18,6	19,4	17,0	-12,2%				
Switzerland	15,7	19,3	17,9	-7,3%				
Turkey	32,4	21,7	18,0	-16,7%				
Uk	15,1	16,4	15,1	-7,8%				
Other Europe	23,3	24,8	18,0	-27,4%				
MIDDLE EAST	14,1	18,6	25,3	36,1%				
United Arab Emirates	12,9	20,9	8,4	-59,5%				
Other Middle East	14,2	18,4	27,6	49,7%				
NORTH AMERICA	14,2	17,8	15,5	-12,6%				
Canada	17,7	22,0	14,4	-34,3%				
USA	13,5	17,4	15,7	-9,3%				
Other North America	0,0	0,0	23,0					
TOTAL	10,7	12,7	13,6	7,4%				
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	ACCOMMODATION TYPE - BED NIGHTS Q2 2023								
	Hotels	Guest House	BnB	Self-Catering	Game Lodge	Backpacker	Camping	Friends & Family	Air B&B
AFRICA	758617	203071	130751	720066	44388	209454	13966	16146549	27322
Botswana	35932	11420	3763	5255	6493	0	482	227871	305
Lesotho	20216	16714	530	389277	0	143241	8303	2854906	0
Malawi	59541	3858	1347	15212	622	4997	0	258056	3715
Mozambique	68921	10834	2811	15247	3249	777	982	3039087	573
Namibia	30842	34485	37307	41066	1999	3802	0	145265	933
eSwatini	19487	29123	21300	2000	6195	824	0	1485079	162
Zambia	104156	3360	0	9890	155	18638	0	150379	2735
Zimbabwe	256031	62545	35248	186858	21877	17197	0	7698884	8589
Angola	24193	13251	8610	19163	119	0	453	43822	986
DRC	18723	995	2374	0	662	0	0	37402	0
Ethiopia	3206	2574	0	260	0	532	0	9939	208
Ghana Kenya	8722 33889	698 3281	1479 12049	2101 7584	0 789	0 9029	0 3341	11839 31411	4040 3434
Nigeria	17321	1987	705	2586	82	107	46	23065	636
Tanzania	14948	1755	1463	4382	519	9828	0	42710	347
Uganda	7171	2009	206	6262	347	0	0	10590	0
Other Africa	35317	4180	1560	12923	1280	482	359	76244	660
ASIA	211544	45154	27703	115892	42627	4495	1951	315212	12657
China including Hong Kong	41164	14283	6328	20407	4203	3671	769	76375	5176
India	108446	18347	17825	50895	32804	487	1016	126678	2156
Japan	9147	3664	1717	994	968	207	55	20040	524
Malaysia	6795	596	0	16572	314	130	0	3525	2052
Singapore	11969	284	0	1286	1455	0	0	2179	356
South Korea	4550	774	247	0	387	0	110	28409	1254
Other Asia	29473	7206	1587	25738	2497	0	0	58006	1139
AUSTRALASIA	62742	17991	6048	8111	31621	7088	5593	260640	6724
Australia	53874	15723	5753	6240	25762	6735	4190	196932	4454
New Zealand	8853	2268	283	1871	5859	353	1403	61297	2270
Other Australia	16	0	12	0	0	0	0	2411	0
CENTRAL & SOUTH AMERICA	33494	8098	1963	3194	8212	7054	1857	40306	680
Argentina	2499	342	852	192	1417	24	60	4454	139
Brazil	17302	6869	641	2260	4468	1425	1477	19314	317
Chile Other Central & South America	2035 11659	71 816	35 435	735 8	458 1869	0 5605	320 0	2344 14194	0 224
EUROPE	589968	291656	131964	350065	310304	77881	35120	1108420	101913
Austria	8133	9236	4303	5433	8927	1249	128	10151	1131
Belgium	25108	14311	8387	7121	22426	5119	563	28985	4408
Denmark	7297	1598	3441	9952	8482	165	2310	12338	522
Finland	5097	121	242	8063	2231	0	103	5151	0
France	77857	45315	9616	88505	59092	13107	6008	132461	16077
Germany	97044	79649	21570	60198	52074	20315	12906	150569	29374
Ireland	12247	2617	1032	19263	4074	0	917	27807	1840
Italy	31247	4502	2781	15556	10778	4217	1901	35845	559
The Netherlands	53219	25439	20873	35563	29307	4117	2547	90129	8097
Norway	4723	1396	1112	5643	3368	1036	0	8358	296
Portugal	11050	3118	1031	4628	1338	3087	87	18795	1283
Russian Federation	18276	25442	538	5186	3962	8678	0	15339	3802
Spain	19897	2095	1688	1204	10306	409	883	30542	2256
Sweden	9915	6021	1683	2316	6793	3136	544	13129	437
Switzerland 	22435	8395	6184	3966	10731	2176	1108	30795	11698
Turkey	9116	1299	1399	12188	1601	0	0	25176	0
Uk	157321	55296	43496	58894	65882	7195	4315	428678	17539
Other Europe	19986	5807	2587	6386	8933	3874	800	44172	2595
MIDDLE EAST	27577	5606	2825	62979	4115	646	0	147419	4550
United Arab Emirates	3398	0	0	219	0	0	0	6459	192
Other Middle East NORTH AMERICA	24179 208518	5606 54893	2825 41064	62760 51110	4115 143828	646 4574	0 9284	140960 477820	4358 22898
Canada	28908	9663	8148	5960	16864	2294	2923	72348	735
USA	179609	45230	32916	45150	126965	2294	6361	405404	22163
Other North America	177007	0	0	0	0	0	0	68	0
TOTAL	1892461	626469	342317	1311418	585095	311191	67771	18496365	176744



		ACC	OMMODATION	TYPE - BED NIG	HTS Q2 2022				
	Hotels	Guest House	BnB	Self Catering	Game Lodge	Backpacker	Camping	Friends & Family	Air B&B
AFRICA	367903	180462	64358	550721	43931	245485	14748	5771108	0
Botswana	37232	10077	4336	17336	4571	0	87	171999	0
Lesotho	10540	33296	27944	274709	1001	194067	1653	2412922	0
Malawi	10549	11286	769	7414	4610	1136	0	79505	0
Mozambique	54432	14483	134	2666	421	369	0	1375820	0
Namibia	29120	21884	13953	65489	3870	13486	4114	186857	0
Eswatini	17701	12094	2284	3185	7188	0	910	692043	0
Zambia	28822	2538	1577	23986	8765	0	0	57708	0
Zimbabwe	60871	31286	6171	103927	8178	32246	7566	506341	0
Angola	21067	8989	2102	5790	1739	0	0	54064	0
DRC	8119	1080	0	5939	161	201	121	39126	0
Ethiopia	4170	643	174	0	56	0	0	8015	0
Ghana	16252	2151	1793	2170	0	0	0	23731	0
Kenya	16202	2274	687	754	270	537	213	20753	0
Nigeria	12273	2076	641	5821	26	137	0	23487	0
Tanzania	11567	4178	980	13948	142	824	0	19590	0
Uganda	6428	5551	0	10048	0	2258	0	15067	0
Other Africa	22558	16575	813	7539	2932	224	86	84079	0
ASIA	99114	15229	2727	19087	8525	740	588	256399	0
China including Hong Kong	8852	1559	620	1782	1027	331	86	21574	0
India	66897	7106	644	15704	3360	172	501	106596	0
Japan	6845	103	0	60	1488	119	0	8520	0
Malaysia	2159	850	84	167	742	0	0	13388	0
Singapore	1318	505	0	0	34	0	0	5050	0
South Korea	1533	4002	929	0	531	118	0	21615	0
Other Asia	11510	1103	450	1374	1343	0	0	79656	0
AUSTRALASIA	22082	7348	3968	4609	8379	574	625	188907	0
Australia New Zealand	20794	5874 1465	2752	3887	7256	258	415 209	143224 45483	0
Other Australia	1267 20	1465	1184 31	721 0	1121 2	316 0	0	200	0
CENTRAL & SOUTH AMERICA	17886	8319	3307	15310	4406	2677	258	46542	0
Argentina	1434	569	216	120	1597	938	74	4254	0
Brazil	9790	5338	2065	7648	1353	1739	95	25548	0
Chile	1164	96	145	43	163	0	90	2897	0
Other Central & South America	5498	2317	880	7500	1292	0	0	13843	0
EUROPE	494541	196297	101807	286476	188792	51997	26954	1243607	0
Austria	8046	1166	1187	9669	3148	1243	163	13546	0
Belgium	16280	16368	6661	10870	10251	779	442	34526	0
Denmark	9864	1785	1233	3557	8029	2736	128	14190	0
Finland	4583	891	904	2529	1262	77	0	8360	0
France	54884	27119	10447	68264	21545	7804	5245	97505	0
Germany	79489	41493	24958	51214	40778	12093	8455	146884	0
Ireland	12034	3910	2859	0	3563	268	0	40120	0
Italy	21239	6335	3385	10623	3809	1898	470	42657	0
The Netherlands	32403	23051	8839	52095	21580	9075	2732	115479	0
Norway	2838	976	1157	5173	2052	211	0	10437	0
Portugal	7272	3191	399	2411	1494	1790	0	19958	0
Russian Federation	11878	2081	836	3338	318	233	0	27132	0
Spain	23584	3529	835	10592	6674	2533	2495	26116	0
Sweden	11418	2309	967	2627	4326	3314	337	17931	0
Switzerland	23510	6335	5212	6356	13681	1121	951	35336	0
Turkey	6932	5954	0	9938	325	0	0	18955	0
UK	150613	36666	24645	28262	38461	6608	5460	520780	0
Other Europe	17673	13140	7281	8961	7498	216	77	53696	0
MIDDLE EAST	19466	9109	1380	788	2109	7585	961	80862	0
United Arab Emirates	1006	945	0	64	0	0	0	6639	0
Other Middle East	18459	8164	1380	724	2109	7585	961	74222	0
NORTH AMERICA	231065	47633	29602	99281	138510	19332	12419	661445	0
Canada	21377	11599	6610	11212	8515	6787	2931	70593	0
USA	209688	36034	22992	88069	129995	12545	9487	590853	0
Total	1252057	464397	207150	976271	394653	328389	56551	8248871	0

			ACCOMMODATION TYPE - BED NIGHTS Q2 2021											
	Hotels	Guest	B&B	DATION TYPE - BED NIGH Self-catering	TS Q2 2021 Game lodge	Backpacker	Camping	Friends &	Air B&B					
	11000	house		501. 22.25		Duckpa	Cup5	family	71. 2					
Africa	133 825	62 351	10 548	109 971	26 402	38 201	3 744	2 034 609	5 209					
Botswana	3 950	6 264	65	249	3 785	728	1 487	56 075	109					
Lesotho	6 451	6 696	5 800	82 553	7 478	27 260	912	765 877	50					
Malawi	3 187	1 487	26	547	10	516	14	19 419	15					
Mozambique	43 236	22 170	2	2 073	5 187	245	39	784 692	65					
Namibia	6 903	5 670	974	7 981	2 499	1 118		111 604	583					
Swaziland	7 239	4 194	860	155	1 246	31	834	120 497	351					
Zambia	2 402	305	64	2 058	3 490	910	288	14 561	173					
Zimbabwe	12 719	4 544	671	4 776	1 537	2 358		42 557	617					
Angola	3 979	2 159	375	2 853	112	549	52	11 399	522					
Democratic Republic of Congo	1 736	1 642	153	1 334	70	326		12 518	26					
Ethiopia	2 861	54		7	78	464		34 428	52					
Ghana	2 800	737	78	78	105	417		5 032	120					
Kenya	4 929	575	284	743	195	683		7 579	1 026					
Nigeria 	22 820	1 413	199	2 515	121	1 418		14 436	885					
Tanzania	1 346	1 325	75	942			440	7 750	254					
Uganda	672	216	6	405	443	4 470	118	9 183	50					
Other Africa	6 593	2 901	914	702	663	1 179	3/5	17 001	310					
Asia	104 046	46 591	1 641	8 437	5 774	5 301	365	86 912	5 449					
China including Hong Kong	9 871	2 203	1 148	1 964	3 127	1 177	169	35 829 10 475	1 008					
India	85 899 2 024	42 042 913	266 5	4 021 396	815 399	1 822 1 725	52 105	19 475 4 805	3 407					
Japan	685	913	29	396 26	399 56	1 725	105	4 805 3 021	261					
Malaysia	1 644	7	£7	20	711	221	39	3 02 i 741						
Singapore South Korea	1 088	364	26	851	235	441	37	3 507	523					
	2 834	1 061	166	1 178	430	346		19 533	250					
Other Asia	20 767	4 060	2 312	2 617	9 847	2 165	5 034	37 738	3 472					
Australasia Australia	17 496	2 704	2 078	1 794	8 167	1 990	3 764	30 265	3 080					
Australia New Zealand	3 270	1 355	234	823	1 680	174	1 269	7 473	392					
Other Australasia	32,0	1 333	25-1	023	1 000	177	1 20,	1 713	3/2					
Central & South America	9 845	1 970	31	1 664	1 979	6 043	274	9 375	1 943					
Argentina	2 264	626	28	324	840	1 442	78	2 771	495					
Brazil	3 861	693		1 006	855	2 829	105	4 326	334					
Chile	1 137	11	2	71	31	1 517	'	701	222					
Other Central & South America	2 583	640		263	253	254	91	1 578	891					
Europe	184 716	111 184	31 340	48 391	100 915	50 384	20 300	306 873	58 723					
Austria	3 429	1 378	918	484	2 474	144	523	3 021	531					
Belgium	7 739	4 248	1 529	1 496	4 040	1 337	659	7 079	1 277					
Denmark	3 135	549	653	1 100	3 065	994	523	7 135	1 111					
Finland	717	308	146		891	601		1 260	261					
France	17 609	5 609	2 101	3 452	11 148	5 139	2 264	21 991	7 749					
Germany	40 242	21 204	8 065	11 745	20 328	15 388	4 134	45 241	14 438					
Ireland	4 058	771	315	512	898	209	340	5 761	288					
Italy	10 348	6 272	1 330	1 169	3 999	1 955	497	12 787	1 525					
Netherlands	15 708	6 982	4 104	3 291	9 784	6 643	2 726	22 358	6 934					
Norway	3 289	879	144	606	1 353	1 531	209	3 215	3 666					
Portugal	3 162	631	103	5 880	1 699	1 148	366	6 177	1 639					
Russian Fed	2 525	1 960	157	327	758	444	418	4 548	222					
Spain	3 146	1 688	178	196	1 755	941	118	2 254	850					
Sweden	4 725	1 844	235	4 058	1 946	1 808	264	11 871	917					
Switzerland	6 587	2 813	1 974	1 490	5 336	2 293	2 423	5 372	1 907					
Turkey	2 461	20 160	392	575	706	185	65	2 704	35					
UK	49 875	12 649	8 244	10 854	27 911	9 243	4 065	134 622	14 708					
Other Europe	5 960	21 240	752	1 158	2 824	382	706	9 475	665					
Middle East	4 406	1 299	488	1 019	1 599	1 806	265	16 993	1 489					
UAE	341	78	65		26			2 368	255					
Other Middle East	4 065	1 220	423	1 019	1 573	1 806	265	14 625	1 233					
North America	49 970	15 655	6 742	8 869	42 181	7 144	2 367	63 954	12 478					
Canada	8 121	8 525	1 115	2 961	5 142	2 204	580	11 681	3 334					
USA	41 849	7 130	5 627	5 908	37 039	4 941	1 787	52 274	9 145					
Total	507 574	243 109	53 103	180 969	188 698	111 044	32 349	2 556 454	88 763					





			PURPOSE OF	VISIT (CATEG	ORIES)				
				Q2 2023					
	Holiday	Shopping personal	Shopping business	Business traveller	MICE	Medical	VFR	Religion	Other
AFRICA	6,4%	5,4%	9,4%	3,2%	2,8%	1,9%	63,4%	1,5%	6,0%
Botswana	13,9%	2,0%	7,1%	24,9%	4,2%	1,7%	33,1%	3,3%	9,8%
Lesotho	0,3%	0,4%	1,8%	0,5%	1,4%	1,0%	80,5%	1,7%	12,4%
Malawi	9,4%	7,4%	43,6%	5,3%	6,7%	0,2%	23,0%	0,5%	4,0%
Mozambique	7,1%	9,3%	2,7%	0,4%	0,4%	3,4%	75,0%	0,3%	1,5%
Namibia	16,4%	1,8%	4,8%	11,0%	15,5%	3,5%	29,6%	2,4%	15,1%
Swaziland	7,4%	0,7%	4,5%	0,8%	0,5%	1,1%	77,8%	3,1%	4,1%
Zambia	4,2%	1,2%	49,5%	7,2%	9,9%	0,6%	19,2%	3,0%	5,2%
Zimbabwe	6,2%	9,1%	16,5%	1,8%	2,3%	1,8%	57,7%	1,1%	3,5%
Angola	23,0%	2,8%	1,1%	13,1%	7,2%	13,7%	22,9%	0,0%	16,3%
Democratic Republic of Congo	10,4%	1,1%	2,9%	7,4%	14,9%	2,9%	48,8%	0,8%	10,8%
Ethiopia Ghana	5,8% 18,5%	3,1% 0,0%	0,0% 2,3%	16,0% 13,1%	27,6% 25,5%	3,3% 2,9%	27,6% 25,1%	0,0% 0,0%	16,6% 12,6%
Kenya	15,4%	0,0%	0,7%	9,5%	28,5%	1,4%	14,3%	3,3%	26,8%
Nigeria	14,9%	0,4%	0,4%	13,1%	24,6%	1,5%	24,0%	2,0%	19,1%
Tanzania	10,1%	0,8%	0,0%	12,3%	19,6%	1,7%	25,2%	1,6%	28,7%
Uganda	10,6%	0,0%	1,4%	10,2%	35,1%	0,0%	22,8%	5,5%	14,4%
Other Africa	14,8%	1,0%	0,4%	18,1%	15,5%	1,2%	29,4%	2,2%	17,4%
ASIA	29,3%	0,3%	0,0%	18,4%	17,8%	0,1%	26,7%	0,5%	6,9%
China including Hong Kong	21,9%	0,6%	0,0%	23,6%	18,0%	0,0%	32,0%	0,0%	3,9%
India	32,0%	0,4%	0,0%	21,9%	15,9%	0,0%	20,1%	1,0%	8,8%
Japan	24,1%	0,0%	0,0%	9,1%	28,4%	0,9%	35,4%	0,0%	2,0%
Malaysia	32,6%	0,0%	0,0%	22,1%	18,2%	2,9%	24,2%	0,0%	0,0%
Singapore	52,1%	0,0%	0,0%	5,2%	18,8%	0,0%	20,8%	0,0%	3,1%
South Korea	21,9%	0,0%	0,0%	8,1%	14,7%	0,0%	52,2%	0,0%	3,1%
Other Asia	26,7%	0,0%	0,0%	10,6%	19,5%	0,0%	32,3%	0,4%	10,5%
AUSTRALASIA	33,2%	0,0%	0,0%	4,8%	4,1%	0,4%	52,6%	0,0%	4,9%
Australia	32,4%	0,0%	0,0%	5,2%	3,9%	0,5%	52,2%	0,0%	5,9%
New Zealand	36,8% 4,7%	0,0% 0,0%	0,0% 0,0%	3,1% 0,0%	5,1% 4,7%	0,0% 0,0%	53,9% 88,4%	0,0%	1,0% 2,3%
Other Australasia CENTRAL & SOUTH AMERICA	43,6%	1,1%	0,0%	25,0%	8,0%	0,0%	16,2%	1,6%	4,5%
Argentina	42,5%	0,0%	0,0%	18,1%	4,3%	0,0%	31,2%	0,0%	3,8%
Brazil	35,8%	2,0%	0,0%	30,8%	12,3%	0,0%	11,4%	3,0%	4,7%
Chile	27,4%	0,0%	0,0%	33,3%	17,1%	0,0%	16,5%	0,0%	5,6%
Other Central & South America	60,4%	0,0%	0,0%	15,6%	0,0%	0,0%	19,8%	0,0%	4,1%
EUROPE	46,5%	0,0%	0,0%	12,4%	7,6%	0,2%	27,1%	0,2%	6,1%
Austria	50,1%	0,0%	0,0%	14,3%	6,7%	0,0%	18,9%	1,7%	8,3%
Belgium	58,4%	0,0%	0,0%	10,3%	9,1%	0,0%	14,0%	0,0%	8,2%
Denmark	53,2%	0,0%	0,0%	8,0%	9,0%	0,0%	25,5%	0,7%	3,6%
Finland	54,3%	0,0%	0,0%	10,8%	12,8%	0,0%	10,8%	0,0%	11,3%
France	54,0%	0,0%	0,0%	12,7%	6,1%	0,2%	18,1%	0,0%	8,8%
Germany	54,4%	0,1%	0,0%	11,0%	5,8%	0,0%	22,1%	0,4%	6,2%
Ireland	31,6%	0,0%	0,0%	2,9%	7,5%	0,0%	50,0%	0,0%	8,0%
Italy Netherlands	48,7% 47,4%	0,0%	0,0% 0,0%	20,3%	9,8% 7,0%	0,0%	15,4% 26,4%	0,0%	5,9%
Norway	46,1%	0,0% 0,0%	0,0%	11,7% 16,0%	8,1%	0,6% 0,0%	24,7%	0,6% 0,0%	6,3% 5,1%
Portugal	35,4%	0,0%	0,0%	21,9%	13,0%	0,0%	23,4%	0,0%	6,3%
Russian Fed	43,9%	0,0%	0,0%	26,2%	6,7%	0,0%	16,7%	0,0%	6,4%
Spain	50,7%	0,0%	0,0%	18,1%	10,4%	0,0%	18,8%	0,0%	1,9%
Sweden	51,0%	0,0%	0,0%	12,6%	8,2%	0,0%	21,1%	1,1%	6,0%
Switzerland	60,0%	0,0%	0,0%	12,0%	4,9%	0,9%	16,7%	0,0%	5,5%
Turkey	37,7%	0,0%	0,0%	28,8%	8,8%	0,0%	18,0%	0,0%	6,7%
UK	39,3%	0,1%	0,0%	8,1%	7,4%	0,1%	40,0%	0,0%	4,9%
Other Europe	27,9%	0,0%	0,0%	28,8%	14,7%	0,0%	22,6%	0,0%	6,0%
MIDDLE EAST	21,2%	0,0%	0,0%	7,6%	9,1%	0,0%	51,6%	0,0%	10,6%
UAE	6,7%	0,0%	0,0%	17,7%	33,3%	0,0%	42,3%	0,0%	0,0%
Other Middle East	23,1%	0,0%	0,0%	6,2%	5,8%	0,0%	52,9%	0,0%	12,0%
NORTH AMERICA	59,6%	0,0%	0,1%	5,5%	4,3%	0,2%	22,1%	0,8%	7,4%
Canada	53,6%	0,0%	0,0%	5,3%	5,6%	0,4%	30,4%	0,5%	4,3%
USA 	60,6%	0,0%	0,2%	5,5%	4,1%	0,2%	20,6%	0,9%	8,0%
Total	13,5%	4,4%	7,7%	4,7%	3,7%	1,6%	56,9%	1,3%	6,1%

		PURPOSE O	F VISIT (CATE	GORIES) Q2 2	2022				
	Holiday	Shopping	Shopping	Business	MICE	Medical	VFR	Religion	Other
Africa	40/	personal	business	traveller	2.20/	4.00/	44.40/	4.40/	0.404
Botswana	6.4%	3.1%	23.4%	11.3%	2.3%	1.8%	41.1%	1.1%	9.6%
Lesotho	12.7% 1.2%	2.4% 0.4%	12.3% 2.5%	15.7% 1.1%	1.2%	0.5% 2.2%	33.7% 65.7%	4.8% 0.7%	14.9% 25.2%
Malawi	4.9%	0.4%	66.1%	14.3%	4.3%	0.2%	7.5%	0.7%	2.7%
Mozambique	9.5%	11.0%	7.4%	0.4%	0.5%	4.0%	64.0%	0.4%	2.9%
Namibia	15.2%	0.5%	2.5%	16.9%	5.4%	2.5%	37.9%	1.4%	17.6%
Swaziland	10.3%	1.5%	8.3%	2.9%	2.0%	1.2%	65.0%	4.8%	4.0%
Zambia	5.1%	0.3%	51.1%	19.1%	5.7%	0.5%	12.0%	0.1%	6.1%
Zimbabwe	2.5%	1.0%	56.6%	26.8%	1.6%	0.4%	8.4%	0.1%	2.5%
Angola	26.5%	1.3%	0.0%	12.4%	7.4%	11.9%	28.0%	0.0%	12.5%
Democratic Republic of Congo	12.5%	2.5%	0.0%	5.1%	11.9%	8.8%	41.1%	2.0%	16.1%
Ethiopia	7.3%	0.0%	1.4%	21.4%	21.3%	3.2%	21.3%	1.4%	22.7%
Ghana Kenya	30.2%	0.0%	0.0%	12.9%	18.5%	1.4%	13.9%	0.0%	23.2%
Nigeria	12.7% 14.1%	0.7% 0.4%	0.0% 0.4%	10.7% 13.2%	23.4% 16.3%	0.7% 1.5%	20.1% 36.1%	0.0% 0.4%	31.7% 17.6%
Tanzania	21.8%	0.4%	2.7%	10.9%	12.8%	2.4%	23.8%	0.4%	24.0%
Uganda	11.7%	0.0%	0.0%	9.9%	23.6%	1.7%	18.5%	0.0%	34.7%
Other Africa	21.5%	0.3%	0.7%	12.6%	19.4%	0.8%	26.0%	0.7%	18.1%
Asia	18.5%	0.2%	0.1%	21.2%	17.8%	0.3%	29.5%	0.3%	12.0%
China including Hong Kong	19.4%	0.3%	0.3%	19.1%	20.7%	0.0%	35.8%	0.0%	4.4%
India	19.5%	0.2%	0.0%	25.5%	19.4%	0.4%	21.8%	0.6%	12.7%
Japan	17.9%	0.0%	0.0%	16.8%	31.2%	0.9%	29.2%	0.0%	4.1%
Malaysia	29.1%	0.0%	0.0%	12.5%	12.5%	0.0%	41.7%	0.0%	4.2%
Singapore	22.5%	0.0%	0.0%	13.2%	21.0%	0.0%	43.2%	0.0%	0.0%
South Korea	13.4%	0.0%	0.0%	15.4%	11.5%	0.0%	51.6%	0.0%	8.1%
Other Asia	14.8%	0.4%	0.6%	14.9%	10.1%	0.0%	40.7%	0.0%	18.5%
Australasia	17.8%	0.2%	0.0%	4.2%	3.4%	0.0%	70.1%	0.0%	4.4%
Australia New Zealand	18.7%	0.0%	0.0%	4.1%	3.8%	0.0%	69.4%	0.0%	4.1%
Other Australasia	12.5% 27.3%	1.1% 0.0%	0.0% 0.0%	5.2% 0.0%	1.2% 0.0%	0.0%	74.1% 63.6%	0.0% 0.0%	6.1% 9.1%
Central & South America	33.9%	0.0%	0.0%	12.6%	6.8%	0.0%	33.0%	1.3%	12.3%
Argentina	39.4%	0.0%	0.0%	15.0%	9.3%	0.0%	25.2%	1.9%	9.3%
Brazil	30.0%	0.0%	0.0%	16.4%	8.8%	0.0%	32.6%	2.0%	10.2%
Chile	37.0%	0.0%	0.0%	16.7%	14.3%	2.4%	29.7%	0.0%	0.0%
Other Central & South America	38.9%	0.0%	0.0%	4.6%	1.5%	0.0%	36.4%	0.0%	18.6%
Europe	43.0%	0.1%	0.1%	7.2%	8.4%	0.2%	34.9%	0.2%	6.0%
Austria	43.1%	0.0%	0.0%	8.0%	6.7%	1.8%	30.8%	0.0%	9.7%
Belgium	55.7%	0.0%	0.4%	5.5%	8.1%	1.0%	19.2%	0.0%	10.1%
Denmark	56.8%	1.6%	0.0%	10.4%	7.6%	0.0%	18.2%	0.0%	5.5%
Finland France	35.3%	0.0% 0.0%	0.0% 0.3%	15.4% 8.8%	16.9%	0.0% 0.0%	23.5%	0.0% 0.3%	9.0% 7.7%
Germany	54.1% 54.4%	0.0%	0.3%	6.5%	7.3% 7.9%	0.0%	21.6% 25.0%	0.3%	6.0%
Ireland	25.4%	0.0%	0.0%	5.7%	5.8%	0.0%	57.2%	0.0%	5.9%
Italy	37.9%	0.0%	0.0%	13.8%	15.0%	0.0%	23.6%	1.4%	8.4%
Netherlands	41.1%	0.0%	0.0%	9.1%	7.1%	0.4%	38.2%	0.0%	4.2%
Norway	36.1%	0.0%	0.0%	5.6%	14.4%	0.0%	35.9%	2.2%	5.8%
Portugal	32.7%	0.8%	1.0%	13.6%	11.0%	1.9%	33.5%	0.0%	5.5%
Russian Fed	33.7%	0.0%	0.0%	29.0%	7.4%	0.0%	26.2%	0.0%	3.6%
Spain	37.2%	0.0%	0.0%	13.6%	8.8%	0.0%	25.0%	1.0%	14.3%
Sweden	44.3%	0.0%	0.9%	11.3%	13.6%	0.0%	23.7%	0.0%	6.3%
Switzerland	47.9%	0.0%	0.4%	6.3%	9.0%	0.0%	27.7%	0.6%	8.1%
Turkey UK	36.9% 37.3%	0.0%	0.0%	12.2%	15.6%	0.0%	29.0%	0.0%	6.3%
Other Europe	37.3% 33.4%	0.1% 0.0%	0.0% 0.0%	3.2% 15.9%	7.8% 9.3%	0.1% 0.0%	47.4% 30.4%	0.1% 0.0%	3.9% 11.0%
Middle East	27.4%	0.0%	0.0%	8.8%	9.3%	1.3%	49.4%	0.0%	3.4%
UAE	19.3%	0.0%	0.0%	1.0%	16.6%	0.0%	61.0%	0.0%	2.1%
Other Middle East	27.9%	0.0%	0.0%	9.3%	9.4%	1.4%	48.5%	0.0%	3.4%
North America	51.2%	0.0%	0.0%	6.3%	5.7%	0.1%	27.6%	0.9%	8.1%
Canada	41.7%	0.0%	0.0%	6.5%	5.7%	0.5%	39.3%	0.5%	5.9%
USA	52.2%	0.0%	0.0%	6.3%	5.7%	0.1%	26.3%	0.9%	8.4%
Total	14.4%	2.4%	18.0%	10.6%	3.7%	1.4%	39.6%	0.9%	9.0%

		PURPOSE OF VISIT (CATEGORIES) Q2 2021										
	Holiday	Shopping personal	Shopping business	Business traveller	MICE	Medical	VFR	Religion	Other			
Africa	34,2%	0,0%	0,0%	3,9%	4,1%	0,1%	31,0%	1,1%	25,6%			
Botswana	4,4%	2,4%	20,9%	31,7%	1,7%	0,9%	16,6%	1,4%	20,0%			
Lesotho	0,8%	3,3%	6,0%	8,4%	1,7%	2,6%	47,1%	0,2%	29,9%			
Malawi	0,7%	0,2%	52,0%	42,4%	0,4%	0,1%	1,6%	0,0%	2,6%			
Mozambique	16,1%	17,7%	14,2%	0,1%	0,0%	4,9%	43,4%	0,2%	3,5%			
Namibia	9,2%	0,1%	8,3%	15,9%	1,0%	1,7%	38,5%	0,2%	25,2%			
Swaziland	3,7%	0,7%	35,4%	23,3%	2,5%	1,5%	26,2%	1,4%	5,4%			
Zambia	1,2%	0,3%	45,5%	41,8%	0,5%	0,1%	7,1%	0,4%	3,1%			
Zimbabwe	0,8%	0,6%	42,5%	50,7%	0,4%	0,0%	2,8%	0,2%	2,0%			
Angola	41,5%	2,7%	0,1%	1,4%	1,6%	1,6%	32,7%	2,0%	16,4%			
Democratic Republic of Congo	27,0%	1,4%	0,5%	2,1%	2,3%	2,1%	55,4%	1,4%	7,8%			
Ethiopia Ghana	12,5%	0,0%	0,0%	2,6%	4,8%	0,3%	18,7%	0,0%	61,2%			
Kenya	49,8%	0,0%	0,0%	2,5%	6,5%	1,0%	25,9%	8,0%	6,2%			
Nigeria	13,8% 38,9%	0,0% 0,5%	0,2% 0,0%	3,8% 3,5%	5,0% 3,9%	0,0% 0,4%	22,7% 19,4%	6,9%	47,6% 30,8%			
Tanzania	24,1%	0,0%	0,5%	5,2%	5,2%	1,0%	43,6%	2,6% 10,5%	9,9%			
Uganda	31,0%	0,0%	0,0%	5,1%	6,2%	2,0%	37,1%	3,1%	15,5%			
Other Africa	35,6%	1,1%	0,1%	5,8%	6,0%	0,5%	35,6%	3,1%	11,5%			
Asia	34,2%	0,0%	0,1%	3,9%	4,1%	0,1%	31,0%	1,1%	25,6%			
China including Hong Kong	31,0%	0,0%	0,1%	3,7%	3,2%	0,1%	43,6%	0,7%	17,6%			
India	29,8%	0,0%	0,0%	3,8%	5,2%	0,1%	13,8%	1,8%	45,5%			
Japan	51,5%	0,0%	0,0%	6,7%	5,6%	0,3%	27,4%	1,6%	6,9%			
Malaysia	27,4%	0,0%	0,0%	2,0%	4,0%	0,0%	38,3%	0,0%	28,3%			
Singapore	63,3%	0,0%	0,0%	2,3%	8,1%	0,0%	25,3%	0,0%	1,0%			
South Korea	39,1%	0,0%	0,0%	3,8%	5,9%	0,0%	46,1%	2,3%	2,9%			
Other Asia	38,6%	0,0%	0,0%	3,4%	2,1%	0,0%	36,2%	0,0%	19,7%			
Australasia	42,4%	0,0%	0,0%	1,1%	0,8%	0,0%	36,8%	0,2%	18,7%			
Australia	42,1%	0,0%	0,0%	1,1%	0,8%	0,0%	35,1%	0,2%	20,6%			
New Zealand	43,7%	0,0%	0,0%	1,2%	1,0%	0,0%	46,3%	0,0%	7,8%			
Other Australasia												
Central & South America	62,4%	0,0%	0,0%	3,8%	3,5%	0,1%	16,7%	0,0%	13,5%			
Argentina	67,8%	0,0%	0,0%	3,0%	3,4%	0,0%	14,0%	0,0%	11,8%			
Brazil	61,2%	0,0%	0,0%	4,1%	2,9%	0,0%	17,3%	0,0%	14,5%			
Chile	58,1%	0,0%	0,0%	7,0%	7,0%	0,0%	9,7%	0,0%	18,2%			
Other Central & South America	61,0%	0,0%	0,0%	2,7%	3,1%	0,4%	22,0%	0,0%	10,9%			
Europe	59,1%	0,0%	0,0%	2,3%	2,1%	0,0%	27,0%	0,2%	9,3%			
Austria	62,8%	0,0%	0,3%	4,7%	2,5%	0,0%	26,1%	0,0%	3,6%			
Belgium	59,3%	0,0%	0,0%	1,3%	2,4%	0,1%	20,4%	0,0%	16,4%			
Denmark	56,8%	0,0%	0,0%	1,8%	2,6%	0,0%	18,3%	0,0%	20,5%			
Finland	58,9%	0,0%	0,6%	4,4%	2,5%	0,0%	31,2%	0,0%	2,3%			
France	73,4%	0,0%	0,0%	1,9%	1,5%	0,0%	19,1%	0,0%	4,0%			
Germany 	65,1%	0,0%	0,1%	2,1%	1,7%	0,1%	19,8%	0,2%	11,0%			
Ireland 	57,9%	0,0%	0,0%	3,0%	2,3%	0,0%	34,5%	0,0%	2,4%			
Italy	55,1%	0,0%	0,1%	2,9%	2,1%	0,0%	20,8%	0,5%	18,5%			
Netherlands 	60,0%	0,0%	0,1%	2,8%	2,3%	0,0%	24,1%	0,0%	10,6%			
Norway	63,5%	0,0%	0,0%	1,8%	1,2%	0,0%	30,9%	0,0%	2,6%			
Portugal Russian Fed	51,1%	0,0%	0,2%	2,0%	3,6%	0,2%	31,1%	1,1%	10,6%			
Spain	61,1%	0,0%	0,0%	3,6%	4,6%	0,0%	25,1%	0,0%	5,6%			
Sweden	73,5%	0,0%	0,0%	5,1%	4,6%	0,0%	14,1%	0,0%	2,6%			
Switzerland	57,2%	0,0%	0,0% 0,0%	2,0%	2,8%	0,0%	35,8%	0,0%	2,2% 4,7%			
Turkey	67,9%	0,7% 0,0%	0,0%	2,3%	2,6% 2,0%	0,0%	21,8%	0,0% 0,0%	54,9%			
UK	29,5% 52,3%	0,0%	0,0%	1,1% 1,8%	1,9%	0,0% 0,1%	12,4% 37,4%	0,0%	6,4%			
Other Europe	55,2%	0,0%	0,0%	5,5%	2,4%	0,1%	21,1%	0,7%	15,2%			
Middle East	40,0%	0,6%	0,0%	2,6%	2,4%	0,0%	49,8%	1,2%	3,0%			
UAE	32,3%	0,0%	0,0%	3,9%		0,2%		0,0%	8,4%			
Other Middle East	41,0%	0,0%	0,0%	3,9% 2,4%	6,9% 2,0%	0,0%	48,5% 50,0%	1,4%	2,3%			
North America	64,2%	0,7%	0,0%	1,7%	1,3%	0,2%	20,2%	1,9%	10,7%			
Canada	62,3%	0,0%	0,0%	1,7%	1,5%	0,0%	26,5%	2,1%	6,1%			
USA	64,5%	0,0%	0,0%	1,8%	1,2%	0,0%	19,0%	1,9%	11,6%			
Total	16,1%	5,4%	17,5%	15,4%	1,2%	2,0%	30,2%	0,5%	11,6%			
	10,1/0	J,4/0	17,5/0	13,4/0	1,4/0	۷,∪/٥	JU, Z/0	U,J/0	11,0/0			



		REPEAT VISITS BY CO	UNTRY	REPEAT VISITS BY COUNTRY									
		Q2 2023											
	First timers	2 - 3 times	4 - 5 times	6 - 9 times	10 times or more								
Africa	7,4%	14,2%	8,3%	10,1%	26,8%								
Botswana	4,0%	9,2%	5,5%	3,6%	36,5%								
Lesotho	0,7%	2,8%	3,6%	1,9%	1,8%								
Malawi	9,0%	16,9%	9,0%	13,0%	49,7%								
Mozambique	11,6%	20,0%	10,5%	5,2%	4,9%								
Namibia	1,8%	8,0%	8,5%	11,3%	67,7%								
Swaziland	2,3%	11,0%	9,6%	15,2%	32,0%								
Zambia	16,6%	14,7%	7,6%	13,9%	44,9%								
Zimbabwe	8,7%	18,7%	9,5%	16,3%	45,9%								
Angola	21,0%	13,7%	14,4%	17,1%	33,9%								
Democratic Republic of Congo	14,8%	14,3%	10,5%	14,8%	45,7%								
Ethiopia	34,2%	20,9%	7,6%	15,4%	22,0%								
Ghana Kanya	42,6%	23,9%	6,0%	10,2%	17,3%								
Kenya Nigoria	42,5%	19,8%	10,1%	9,4%	18,2%								
Nigeria	37,3%	20,2%	10,7%	9,6%	22,1%								
Tanzania Uganda	25,4% 42,6%	30,8% 22,7%	15,2% 11,0%	8,9% 15,5%	19,8% 8,3%								
Other Africa	29,2%	22,7%	11,0%	15,5%	8,3% 15,0%								
Asia	51,1%	20,7%	10,9%	9,1%	8,8%								
China including Hong Kong	41,1%	16,1%	11,9%	15,1%	15,9%								
India	54,0%	22,1%	13,3%	5,6%	5,0%								
Japan	45,6%	21,3%	8,9%	8,0%	16,2%								
Malaysia	51,1%	33,6%	2,9%	7,9%	4,6%								
Singapore	64,6%	17,7%	3,1%	6,2%	8,4%								
South Korea	44,1%	16,2%	9,4%	16,3%	13,9%								
Other Asia	54,8%	18,8%	6,8%	11,6%	8,0%								
Australasia	34,7%	23,5%	11,7%	15,0%	15,0%								
Australia	32,9%	24,0%	12,4%	16,1%	14,6%								
New Zealand	42,5%	21,0%	9,1%	10,7%	16,7%								
Other Australasia	9,3%	45,3%	2,3%	2,3%	40,7%								
South America	59,5%	22,8%	9,9%	3,6%	4,3%								
Argentina	58,1%	20,7%	6,8%	6,9%	7,5%								
Brazil	53,8%	25,3%	15,3%	3,7%	1,9%								
Chile	67,1%	16,0%	0,0%	2,7%	14,2%								
Other Central & South America	68,4%	20,2%	2,9%	2,5%	5,9%								
Europe	52,0%	20,1%	9,2%	9,3%	9,4%								
Austria	60,9%	29,0%	3,3%	4,5%	2,2%								
Belgium	64,2%	17,7%	4,4%	7,0%	6,7%								
Denmark	46,0%	30,6%	12,9%	4,8%	5,7%								
Finland	74,9%	13,2%	2,1%	5,6%	4,2%								
France	65,0%	16,4%	9,6%	4,6%	4,5%								
Germany	54,1%	20,5%	7,6%	10,0%	7,8%								
Ireland 	37,7%	25,0%	11,9%	13,3%	12,0%								
Italy	64,4%	16,0%	7,7%	6,5%	5,4%								
Netherlands 	51,7%	22,1%	9,6%	9,6%	7,0%								
Norway	56,5%	16,1%	11,5%	6,8%	9,1%								
Portugal	43,8%	18,9%	14,8%	11,2%	11,3%								
Russian Fed	54,3%	13,1%	14,6%	12,4%	5,6%								
Spain Sundan	58,9%	14,4%	8,5%	10,5%	7,7%								
Sweden	54,7%	26,8%	5,3%	6,6%	6,6%								
Switzerland	56,9%	20,3%	9,1%	3,0%	10,8%								
Turkey	43,9%	29,2%	17,7%	9,2%	0,0%								
UK Other Europe	42,6%	20,5% 23,8%	9,5%	12,0% 9,3%	15,4% 5,8%								
Middle East	50,0% 36,2%	15,9%	11,1% 10,8%	17,6%	19,6%								
UAE	22,2%	44,4%	8,9%	6,7%	17,7%								
Other Middle East	38,0%	12,0%	11,0%	19,1%	19,9%								
North America	58,6%	19,4%	8,7%	6,9%	6,5%								
Canada	60,7%	20,0%	6,3%	5,9%	7,1%								
USA	58,2%	19,3%	9,1%	7,0%	6,4%								
Other North America	0,0%	0,0%	33,3%	0,0%	66,7%								
TOTAL	15,6%	15,3%	8,6%	10,0%	23,6%								

		REPEAT VISITS BY CO	DUNTRY						
	First timers	Q2 2022 2 - 3 times	4 - 5 times	6 - 9 times	10 times or more				
AFRICA	7,3%	9,8%	5,2%	6,3%	36,0%				
Botswana	3,2%	6,2%	3,4%	3,7%	34,4%				
Lesotho	1,9%	3,5%	2,1%	1,7%	2,1%				
Malawi	5,4%	6,9%	4,1%	8,4%	72,5%				
Mozambique	12,5%	21,2%	6,9%	6,3%	3,6%				
Namibia	10,0%	3,4%	5,0%	7,2%	71,0%				
eSwatini	2,1%	8,6%	7,1%	12,5%	41,1%				
Zambia	11,5%	7,7%	6,3%	7,5%	55,6%				
Zimbabwe	5,1%	8,0%	5,5%	6,3%	74,3%				
Angola	31,3%	13,2%	7,7%	17,2%	30,6%				
DRC	30,1%	6,1%	7,1%	14,7%	42,0%				
Ethiopia	52,8%	12,7%	5,9%	12,2%	16,3%				
Ghana	47,4%	11,7%	5,5%	18,5%	17,0%				
Kenya Nigoria	50,8%	6,1%	2,4%	14,5%	26,1%				
Nigeria Tanzania	37,4% 38,3%	10,5% 22,1%	7,3% 12,6%	15,5% 11,9%	29,2% 15,1%				
Uganda	46,6%	16,6%	3,3%	13,5%	20,0%				
Other Africa	41,6%	15,6%	10,5%	13,3%	19,0%				
ASIA	56,7%	14,7%	9,5%	9,2%	9,9%				
China including Hong Kong	43,3%	10,8%	5,9%	17,2%	22,8%				
India	60,8%	13,7%	8,4%	9,2%	7,9%				
Japan	52,1%	14,9%	6,9%	18,2%	7,8%				
Malaysia	60,3%	6,3%	4,2%	2,1%	27,1%				
Singapore	53,5%	15,0%	11,5%	6,8%	13,2%				
South Korea	37,2%	21,4%	14,6%	14,6%	12,3%				
Other Asia	55,4%	18,9%	14,1%	3,7%	7,9%				
AUSTRALASIA	27,3%	14,7%	16,8%	17,1%	24,1%				
Australia	27,2%	13,1%	16,4%	17,2%	26,2%				
New Zealand	28,0%	24,2%	19,1%	16,7%	12,1%				
Other Australia	18,2%	0,0%	18,2%	18,2%	45,5%				
CENTRAL & SOUTH AMERICA	51,0%	16,3%	5,5%	13,9%	13,3%				
Argentina	51,1%	20,0%	8,7%	16,4%	3,8%				
Brazil	41,0%	18,1%	7,2%	17,0%	16,7%				
Chile	49,8% 69,0%	20,3%	16,7% 0,0%	8,3%	5,0%				
Other Central & South America EUROPE	50,6%	11,6% 13,4%	8,3%	8,5% 12,6%	11,0% 15,1%				
Austria	59,9%	12,5%	4,0%	10,3%	13,1%				
Belgium	53,8%	17,8%	11,1%	6,8%	10,6%				
Denmark	64,2%	12,2%	6,0%	5,0%	12,7%				
Finland	64,6%	7,5%	3,2%	21,5%	3,2%				
France	64,1%	12,4%	6,5%	10,1%	6,9%				
Germany	53,5%	14,7%	7,5%	13,2%	11,0%				
Ireland	46,3%	12,3%	9,1%	12,6%	19,7%				
Italy	53,0%	10,6%	9,3%	11,5%	15,6%				
The Netherlands	43,9%	16,4%	11,4%	14,3%	14,0%				
Norway	53,6%	13,7%	12,9%	4,4%	15,5%				
Portugal	40,4%	11,0%	10,0%	20,9%	17,6%				
Russian Federation	44,4%	8,6%	7,6%	27,6%	11,9%				
Spain	58,7%	11,4%	5,7%	13,6%	10,6%				
Sweden	48,4%	16,6%	10,3%	10,9%	13,9%				
Switzerland 	52,4%	20,0%	5,8%	13,0%	8,9%				
Turkey	61,2%	10,4%	11,0%	10,4%	7,0%				
Uk	46,0%	12,0%	8,1%	12,7%	21,2%				
Other Europe	43,6%	15,0%	11,8%	14,8%	14,8%				
MIDDLE EAST United Arab Emirates	47,7% 50,1%	8,5 % 12,0%	10,5% 11,1%	12,0% 1,0%	21,3% 25,8%				
Other Middle East	47,5%	8,3%	10,5%	1,0%	25,8%				
NORTH AMERICA	59,7%	13,0%	7,2%	9,5%	10,6%				
Canada	53,5%	15,8%	6,0%	10,3%	14,4%				
USA	61,1%	14,5%	7,3%	7,4%	9,6%				
Other North America	100,0%	0,0%	0,0%	0,0%	0,0%				
TOTAL	15,9%	10,7%	6,7%	9,3%	29,2%				
		· · · · · · · · · · · · · · · · · · ·							

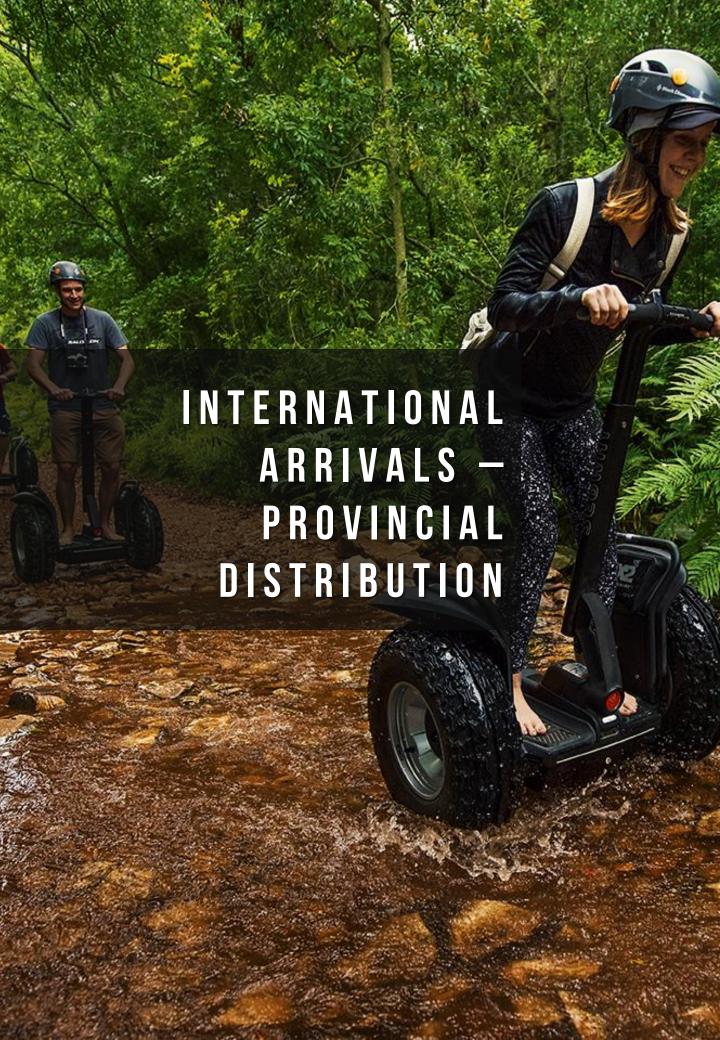
		REPEAT VISITS BY CO	DUNTRY							
	First timers	Q2 2019 2 - 3 times	4 - 5 times	6 - 9 times	10 times or more					
AFRICA	4,5%	8,4%	7,0%	8,9%	42,1%					
Botswana	1,3%	4,0%	3,8%	4,4%	27,0%					
Lesotho	0,4%	1,5%	2,8%	1,0%	66,8%					
Malawi	6,0%	15,9%	8,2%	20,4%	31,7%					
Mozambique	10,4%	13,0%	8,2%	11,7%	15,6%					
Namibia	2,2%	8,7%	6,5%	5,8%	39,8%					
eSwatini	0,8%	4,8%	4,9%	13,3%	56,5%					
Zambia	8,8%	5,8%	8,9%	12,1%	32,3%					
Zimbabwe	3,3%	12,2%	10,3%	11,4%	42,4%					
Angola	28,0%	14,5%	11,8%	17,0%	28,7%					
DRC	13,7%	19,4%	12,9%	13,4%	40,6%					
Ethiopia	36,5%	24,2%	20,9%	6,0%	12,3%					
Ghana	41,9%	22,3%	11,2%	9,8%	14,9%					
Kenya	34,4%	20,8%	14,8%	12,6%	17,3%					
Nigeria	36,3%	25,5%	13,8%	10,0%	14,3%					
Tanzania	29,0%	21,6%	17,1%	15,5%	16,8%					
Uganda Other Africa	39,4%	18,2%	14,8%	14,8%	12,9%					
ASIA	33,1% 50,5%	17,2% 18,2%	17,8% 10,1%	11,5% 7,8%	20,4% 13,4%					
China including Hong Kong	40,8%	20,8%	11,1%	10,5%	16,8%					
India	56,7%	19,4%	10,5%	4,0%	9,4%					
Japan	52,3%	20,1%	9,2%	5,7%	12,8%					
Malaysia	46,9%	0,0%	19,5%	15,6%	18,0%					
Singapore	56,3%	25,5%	2,9%	6,3%	9,1%					
South Korea	46,0%	18,8%	7,9%	7,5%	19,8%					
Other Asia	52,0%	12,7%	7,2%	12,4%	15,7%					
AUSTRALASIA	42,1%	17,5%	11,0%	12,9%	16,5%					
Australia	43,1%	16,8%	10,9%	12,2%	16,9%					
New Zealand	34,4%	22,6%	11,8%	18,0%	13,2%					
Other Australia	33,3%	0,0%	0,0%	0,0%	66,7%					
CENTRAL & SOUTH AMERICA	72,1%	12,3%	4,9%	4,5%	6,1%					
Argentina	69,6%	19,4%	2,1%	0,0%	8,9%					
Brazil	75,0%	11,7%	3,9%	5,7%	3,7%					
Chile	54,1%	23,6%	11,7%	2,6%	8,0%					
Other Central & South America	66,0%	6,6%	9,7%	3,1%	14,5%					
EUROPE	52,0%	17,6%	8,5%	8,9%	12,9%					
Austria	53,3%	17,5%	5,6%	10,0%	13,6%					
Belgium	63,9%	14,3%	8,8%	5,7%	7,3%					
Denmark Finland	59,5% 53,6%	20,0% 13,3%	7,4% 11,3%	2,5% 11,2%	10,6% 10,7%					
France	63,7%	20,3%	5,6%	3,8%	6,7%					
Germany	58,1%	17,7%	7,0%	8,3%	8,9%					
Ireland	54,5%	10,9%	5,7%	5,5%	23,3%					
Italy	54,8%	18,3%	10,0%	8,5%	8,4%					
The Netherlands	52,0%	15,7%	8,5%	6,7%	17,2%					
Norway	68,7%	9,4%	6,6%	4,7%	10,6%					
Portugal	52,0%	14,9%	8,3%	13,5%	11,3%					
Russian Federation	53,8%	17,2%	11,1%	8,0%	10,0%					
Spain	60,9%	17,1%	8,6%	3,8%	9,7%					
Sweden	53,0%	24,1%	8,3%	3,7%	11,0%					
Switzerland	50,6%	17,5%	9,2%	7,4%	15,3%					
Turkey	64,2%	15,8%	4,2%	6,7%	9,1%					
Uk	39,7%	18,2%	9,9%	14,1%	18,0%					
Other Europe	54,4%	16,9%	12,5%	6,3%	9,8%					
MIDDLE EAST	42,3%	17,1%	10,7%	12,6%	17,3%					
United Arab Emirates	46,0%	12,9%	14,1%	10,8%	16,3%					
Other Middle East	42,1%	17,3%	10,5%	12,7%	17,4%					
NORTH AMERICA	67,8%	14,2%	5,8%	5,3%	6,9%					
Canada USA	62,2% 68,5%	14,2% 14,2%	3,9% 6,0%	8,6% 4,8%	11,1% 6,4%					
Other North America	0,0%	0,0%	0,0%	0,0%	0,0%					
TOTAL	15,0%	10,2%	7,3%	8,8%	35,8%					
TOTAL	13,0%	10,2/0	1,3/0	0,0%	33,0%					



			AGE CATEGOR	IES				
			Q2 2023		_			
	15 -17 years	18 - 24 years	25 - 30 years	31 - 34 years	35 - 40 years	41 - 50 years	51 - 60 years	60+ years
AFRICA		14,2%	21,7%	18,0%	19,4%	19,2%	6,1%	1,4%
Botswana		4,6%	10,5%	16,0%	27,7%	29,5%	9,7%	1,9%
Lesotho		27,7%	29,6%	13,8%	13,3%	12,4%	2,8%	0,5%
Malawi		3,9%	13,7%	19,1%	28,3%	23,7%	8,6%	2,6%
Mozambique		17,7%	25,5%	18,8%	19,0%	15,5%	3,3%	0,2%
Namibia		10,3%	11,1%	14,8%	18,4%	22,1%	11,7%	11,6%
eSwatini Zambia		24,7%	29,5%	21,8%	10,8%	8,9%	3,8%	0,5%
Zimbabwe		5,0% 4,4%	13,9% 16,3%	13,6% 19,2%	32,3% 23,0%	29,4% 26,3%	4,8% 9,1%	1,0% 1,7%
Angola		5,2%	9,8%	20,2%	25,2%	23,3%	10,2%	6,2%
DRC		3,6%	15,6%	16,6%	25,0%	15,4%	16,4%	7,4%
Ethiopia		4,8%	14,0%	26,2%	31,1%	9,5%	8,5%	6,0%
Ghana		4,1%	13,6%	20,2%	25,3%	21,4%	9,5%	6,0%
Kenya		4,5%	16,6%	23,0%	19,9%	26,3%	8,1%	1,6%
Nigeria		2,7%	16,2%	19,3%	24,0%	25,6%	9,9%	2,3%
Tanzania		8,1%	19,4%	17,7%	27,8%	12,8%	9,3%	4,8%
Uganda	1	3,6%	14,5%	31,6%	11,1%	23,4%	8,6%	7,2%
Other Africa		5,1%	13,1%	25,3%	25,7%	12,5%	10,0%	8,4%
ASIA		7,0%	17,4%	22,1%	18,9%	18,4%	9,9%	6,3%
China including Hong Kong		5,0%	14,2%	23,4%	23,9%	18,1%	7,4%	8,0%
India		9,7%	17,6%	20,4%	20,0%	15,8%	9,9%	6,5%
Japan		4,0%	19,3%	16,3%	15,0%	25,4%	15,0%	5,0%
Malaysia		5,0%	24,6%	19,3%	27,9%	2,9%	9,6%	10,7%
Singapore		6,2%	9,4%	25,0%	6,2%	27,1%	13,6%	12,5%
South Korea		4,9%	32,2%	22,7%	12,6%	13,7%	10,9%	3,0%
Other Asia		3,6%	17,1%	27,1%	14,4%	25,5%	9,8%	2,3%
AUSTRALASIA		5,5%	10,0%	11,8%	10,6%	21,7%	19,4%	21,0%
Australia		6,0%	11,0%	12,3%	11,0%	21,5%	17,3%	20,9%
New Zealand		3,1% 0,0%	5,7%	8,9%	8,6%	22,9%	28,8%	22,0%
Other Australia CENTRAL & SOUTH AMERICA		· · · · · · · · · · · · · · · · · · ·	2,3%	81,4%	4,7%	2,3%	9,3%	0,0%
Argentina		3,8% 3,8%	18,6% 23,8%	24,3% 16,9%	13,2% 18,9%	21,8% 20,0%	8,9 % 6,9%	9,2 % 9,9%
Brazil		3,9%	13,6%	27,4%	13,4%	26,6%	9,8%	5,3%
Chile		0,0%	17,2%	16,0%	19,0%	16,3%	20,7%	10,9%
Other Central & South America		4,5%	26,1%	22,6%	10,1%	15,1%	6,1%	15,6%
EUROPE		8,9%	17,2%	15,0%	14,5%	21,1%	13,1%	10,2%
Austria		11,6%	14,4%	17,8%	15,6%	16,8%	15,0%	8,8%
Belgium		5,6%	20,7%	15,7%	13,4%	19,0%	11,6%	14,0%
Denmark		6,3%	16,2%	12,7%	15,6%	16,9%	19,4%	12,9%
Finland		9,7%	22,5%	16,9%	12,3%	20,6%	11,3%	6,7%
France		13,4%	18,9%	12,5%	13,6%	20,6%	12,7%	8,2%
Germany		10,5%	19,6%	15,5%	11,5%	18,4%	14,0%	10,5%
Ireland		6,6%	12,3%	11,4%	15,3%	29,7%	19,9%	4,8%
Italy		6,7%	17,4%	21,3%	19,6%	19,1%	8,8%	7,1%
The Netherlands		7,3%	17,8%	13,3%	14,1%	24,2%	13,8%	9,5%
Norway		9,2%	11,2%	14,4%	14,3%	21,3%	23,3%	6,3%
Portugal		4,7%	14,9%	20,2%	23,2%	15,0%	10,6%	11,4%
Russian Federation		10,8%	19,3%	16,2%	24,3%	16,7%	5,5%	7,3%
Spain Sweden		5,8% 7,8%	18,1% 18,0%	18,0% 12,0%	16,3% 12,4%	22,8% 26,8%	13,3% 16,8%	5,6% 6.2%
Switzerland	1	3,4%	25,2%	13,5%	14,7%	26,8%	10,6%	6,2% 6,5%
Turkey	1	11,2%	19,9%	13,5%	26,4%	15,6%	4,6%	8,8%
Uk	1	8,6%	14,2%	14,1%	13,3%	22,7%	13,9%	13,2%
Other Europe	1	8,6%	17,5%	22,4%	20,2%	18,0%	7,0%	6,2%
MIDDLE EAST		12,0%	18,4%	8,4%	29,1%	12,7%	13,1%	6,3%
United Arab Emirates		4,5%	20,0%	13,4%	17,7%	17,8%	24,4%	2,2%
Other Middle East	1	13,0%	18,1%	7,8%	30,6%	12,0%	11,6%	6,8%
NORTH AMERICA		8,3%	13,3%	12,7%	10,6%	17,0%	17,7%	20,4%
Canada		6,3%	12,2%	17,7%	12,7%	19,3%	13,9%	17,9%
USA	1	8,6%	13,5%	11,8%	10,2%	16,6%	18,3%	20,9%
Other North America		0,0%	0,0%	0,0%	33,3%	33,3%	33,3%	0,0%
TOTAL		13,1%	20,6%	17,5%	18,5%	19,3%	7,6%	3,4%

		AGE CARTEGORIES											
			Q2 2021	ILS									
	15 -17 years	18 - 24 years	25 - 30 years	31 - 34 years	35 - 40 years	41 - 50 years	51 - 60 years	60+ years					
AFRICA	2.0%	9.1%	17.0%	16.2%	21.9%	24.7%	7.1%	1.9%					
Botswana	0.0%	2.6%	10.2%	13.9%	28.9%	29.9%	9.4%	5.1%					
Lesotho	7.3%	19.1%	21.5%	16.2%	15.9%	14.9%	3.6%	1.4%					
Malawi	0.0%	0.3%	5.0%	14.3%	24.2%	44.2%	11.9%	0.1%					
Mozambique	1.3%	10.6%	20.2%	18.6%	23.7%	18.9%	5.7%	0.8%					
Namibia	0.0%	8.8%	12.0%	14.8%	18.5%	18.4%	18.9%	8.5%					
Eswatini	0.0%	5.1%	23.3%	23.0%	22.4%	21.4%	4.1%	0.7%					
Zambia	0.0%	1.0%	15.3%	8.5%	33.7%	35.5%	5.3%	0.2%					
Zimbabwe	0.0%	1.7%	7.3%	10.7%	22.3%	44.6%	10.9%	2.4%					
Angola	0.0%	8.9%	17.1%	11.9%	24.6%	20.9%	10.4%	3.2%					
DRC	0.0%	7.9%	10.6%	13.3%	15.1%	25.3%	15.4%	7.8%					
Ethiopia	0.0%	32.4%	9.1%	31.8%	10.1%	12.1%	4.3%	0.3%					
Ghana	0.0% 0.0%	2.4%	29.6%	22.2%	16.7%	13.7%	12.1%	2.7%					
Kenya Nigeria	0.0%	6.4% 2.4%	15.2% 19.7%	9.6% 22.3%	8.4% 30.3%	32.5% 15.0%	6.2% 6.7%	2.0% 2.1%					
Tanzania	0.0%	11.3%	25.6%	17.4%	18.4%	13.3%	7.9%	4.5%					
Uganda	0.0%	14.6%	19.2%	20.2%	17.6%	17.8%	10.0%	0.0%					
Other Africa	0.0%	10.1%	20.4%	7.1%	17.8%	20.0%	12.6%	8.0%					
ASIA	0.0%	12.1%	35.2%	9.6%	14.0%	11.7%	7.8%	3.9%					
China including Hong Kong	0.0%	14.1%	35.4%	11.1%	13.3%	9.4%	9.0%	6.3%					
India	0.0%	7.0%	40.6%	8.5%	13.8%	11.0%	3.0%	2.4%					
Japan	0.0%	19.4%	18.2%	10.4%	16.8%	16.8%	12.7%	2.4%					
Malaysia	0.0%	18.1%	5.5%	0.0%	14.9%	40.1%	11.8%	0.0%					
Singapore	0.0%	13.7%	20.1%	12.7%	27.6%	5.8%	13.8%	6.3%					
South Korea	0.0%	10.6%	26.5%	10.9%	22.1%	11.7%	15.1%	0.8%					
Other Asia	0.0%	14.3%	40.6%	8.9%	10.1%	12.8%	9.0%	3.4%					
AUSTRALASIA	0.0%	13.2%	11.2%	5.6%	10.9%	21.1%	16.9%	16.7%					
Australia	0.0%	14.5%	10.8%	4.5%	10.4%	21.4%	17.0%	16.4%					
New Zealand	0.0%	6.3%	13.5%	12.2%	13.9%	19.3%	16.1%	18.8%					
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
CENTRAL & SOUTH AMERICA	0.0%	9.6%	29.0%	12.2%	17.3%	14.9%	6.8%	2.9%					
Argentina Brazil	0.0% 0.0%	12.9% 9.8%	21.6% 34.2%	16.0% 11.0%	22.3% 19.4%	13.8% 15.8%	2.8% 4.4%	2.3% 0.2%					
Chile	0.0%	5.7%	32.7%	26.7%	2.6%	5.9%	9.1%	0.2%					
Other Central & South America	0.0%	7.8%	25.5%	3.3%	15.5%	18.9%	14.0%	9.8%					
EUROPE	0.0%	14.4%	19.1%	9.3%	11.8%	17.8%	14.5%	12.2%					
Austria	0.0%	18.4%	21.8%	4.9%	9.1%	15.5%	20.3%	8.2%					
Belgium	0.0%	12.0%	19.6%	7.7%	9.7%	25.1%	15.2%	9.9%					
Denmark	0.0%	18.1%	6.6%	6.6%	11.5%	33.1%	18.2%	5.8%					
Finland	0.0%	3.5%	20.3%	14.5%	12.9%	22.7%	12.3%	10.4%					
France	0.0%	14.2%	18.0%	8.2%	10.7%	14.9%	18.4%	15.4%					
Germany	0.0%	17.9%	21.9%	8.4%	12.8%	15.1%	15.3%	8.2%					
Ireland	0.0%	8.8%	22.7%	6.9%	11.4%	13.4%	21.7%	15.2%					
Italy	0.0%	10.7%	20.2%	10.0%	19.3%	23.0%	9.3%	5.5%					
The Netherlands	0.0%	14.8%	22.9%	12.1%	10.8%	12.3%	11.9%	14.5%					
Norway	0.0%	27.3%	16.0%	12.0%	5.8%	13.9%	11.7%	13.3%					
Portugal	0.0%	13.2%	32.3%	15.6%	15.1%	9.9%	5.1%	7.8%					
Russian Federation	0.0%	9.0%	20.6%	18.8%	19.3%	11.6%	11.4%	9.3%					
Spain	0.0%	13.0%	20.6%	12.3%	17.7%	21.7%	7.6%	7.1%					
Sweden	0.0%	11.3%	17.8%	13.5%	9.5%	16.3%	15.2%	14.7%					
Switzerland	0.0%	14.7%	22.1%	12.4%	9.5%	17.0%	11.8%	10.5%					
Turkey UK	0.0% 0.0%	34.5% 12.2%	18.1% 16.6%	1.8% 8.2%	0.6% 11.4%	34.8% 18.6%	2.4%	7.8%					
	0.0%		12.2%	10.9%		27.5%	15.6%	16.1% 8.0%					
Other Europe MIDDLE EAST	0.0%	14.4% 13.8%	21.2%	10.9%	12.5% 11.3%	19.5%	12.3% 10.1%	9.7%					
United Arab Emirates	0.0%	10.8%	29.9%	12.9%	24.5%	22.2%	2.0%	0.0%					
Other Middle East	0.0%	14.3%	29.9%	13.2%	9.5%	19.1%	11.2%	11.0%					
NORTH AMERICA	0.0%	15.8%	15.8%	7.3%	10.9%	11.3%	17.3%	20.3%					
Canada	0.0%	14.5%	16.7%	8.7%	9.5%	14.5%	16.8%	18.8%					
USA	0.0%	16.0%	15.7%	7.0%	11.2%	14.5%	17.4%	20.6%					
Other North America	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
TOTAL	1.6%	10.1%	17.6%	14 9%	20.1%	23.1%	8 4%	3.8%					

	AGE CARTEGORIES									
			Q2 2019							
	15 -17 years	18 - 24 years	25 - 30 years	31 - 34 years	35 - 40 years	41 - 50 years	51 - 60 years	60+ years		
AFRICA		18.4%	26.4%	16.6%	19.4%	14.3%	3.6%	1.0%		
Botswana		9.3%	19.1%	18.1%	24.8%	23.2%	4.0%	1.1%		
Lesotho		42.9%	36.9%	10.8%	7.2%	1.5%	0.2%	0.0%		
Malawi		2.6%	17.8%	21.3%	31.1%	19.0%	7.4%	0.2%		
Mozambique		18.3%	26.8%	19.7%	22.3%	10.6%	1.8%	0.1%		
Namibia 		11.1%	19.9%	12.8%	15.8%	19.1%	13.2%	7.9%		
Eswatini Zambia		20.3%	30.1%	16.2%	17.1%	12.8%	2.9%	0.3%		
Zimbia Zimbabwe		7.9% 6.5%	17.3% 21.9%	15.1% 19.0%	22.3% 24.8%	23.6% 21.3%	8.3% 5.0%	4.6% 1.4%		
Angola		10.7%	18.0%	14.4%	22.5%	18.2%	9.1%	3.9%		
DRC		13.2%	9.9%	10.6%	14.4%	25.7%	14.8%	7.7%		
Ethiopia		8.7%	15.5%	18.0%	22.4%	24.9%	8.9%	1.6%		
Ghana		2.4%	23.5%	16.0%	18.4%	19.8%	13.5%	3.7%		
Kenya		5.8%	16.7%	16.7%	19.5%	28.2%	7.4%	1.6%		
Nigeria		3.0%	13.8%	19.4%	26.4%	21.5%	10.8%	1.9%		
Tanzania		10.1%	22.3%	16.1%	19.2%	22.5%	6.4%	2.4%		
Uganda		7.7%	20.3%	14.8%	23.7%	17.6%	14.1%	0.0%		
Other Africa		11.1%	23.3%	8.0%	20.6%	16.1%	12.0%	6.1%		
ASIA		12.7%	24.0%	11.8%	20.8%	15.4%	9.3%	3.9%		
China including Hong Kong India		15.2% 8.5%	27.1% 24.6%	12.7% 13.5%	17.1% 24.3%	11.7% 17.4%	8.5% 5.3%	6.4% 3.4%		
Japan		13.8%	22.1%	13.4%	17.8%	15.3%	11.8%	4.0%		
Malaysia		24.2%	4.7%	0.0%	29.6%	24.3%	10.2%	0.0%		
Singapore		15.5%	19.3%	9.6%	21.6%	22.1%	9.1%	2.9%		
South Korea		11.2%	19.0%	12.3%	25.7%	14.9%	13.1%	2.5%		
Other Asia		14.2%	27.1%	9.2%	15.3%	12.1%	18.8%	2.7%		
AUSTRALASIA		12.1%	13.9%	5.9%	9.5%	20.6%	18.9%	17.5%		
Australia		13.0%	13.7%	5.1%	8.6%	21.1%	19.3%	17.5%		
New Zealand		5.9%	15.6%	11.9%	16.6%	16.7%	15.5%	17.8%		
Other Australia		0.0%	0.0%	0.0%	0.0%	33.3%	66.7%	0.0%		
CENTRAL & SOUTH AMERICA		12.0%	26.3%	13.4%	19.8%	16.1%	6.7%	1.3%		
Argentina Brazil		13.3% 12.4%	19.9% 26.7%	19.1% 13.5%	22.9% 20.8%	14.7% 16.2%	3.5% 5.0%	1.1% 0.9%		
Chile		4.9%	20.7%	22.6%	8.0%	19.7%	15.5%	0.0%		
Other Central & South America		11.5%	31.1%	6.0%	16.1%	16.0%	14.5%	3.7%		
EUROPE		15.2%	18.4%	9.2%	12.3%	17.5%	15.6%	11.1%		
Austria		15.0%	22.7%	4.1%	10.8%	15.6%	21.8%	7.5%		
Belgium		19.1%	16.8%	8.6%	10.9%	19.6%	17.4%	6.8%		
Denmark		21.9%	7.9%	7.9%	13.1%	17.9%	20.2%	11.1%		
Finland		2.0%	20.5%	13.3%	15.9%	23.2%	15.5%	7.6%		
France		14.8%	16.5%	8.4%	10.9%	17.5%	18.2%	13.6%		
Germany Ireland		20.1% 9.1%	20.3%	8.9%	11.7%	15.2%	15.9% 22.1%	7.3% 11.2%		
Italy		14.3%	23.0% 22.4%	6.3% 11.6%	14.0% 14.5%	14.3% 17.9%	11.9%	5.6%		
The Netherlands		15.5%	21.6%	7.2%	10.9%	14.0%	16.0%	14.2%		
Norway		29.1%	12.4%	13.1%	7.3%	13.8%	10.9%	13.5%		
Portugal		15.4%	32.6%	14.5%	14.6%	11.4%	5.1%	5.6%		
Russian Federation		6.5%	20.4%	19.6%	18.6%	15.8%	10.9%	8.2%		
Spain		11.9%	20.9%	11.4%	19.6%	25.0%	6.6%	4.6%		
Sweden		11.5%	16.4%	12.6%	11.1%	16.2%	17.8%	12.9%		
Switzerland 		16.9%	19.6%	12.3%	11.0%	17.6%	12.5%	9.0%		
Turkey		18.1%	33.4%	4.4%	4.4%	20.0%	8.8%	10.9%		
UK Other Furance		12.6%	15.7%	7.9%	12.4%	19.0%	16.4%	14.8%		
Other Europe MIDDLE EAST		15.5% 13.5%	14.5% 17.6%	15.1% 10.4%	14.2% 17.1%	18.3% 19.5 %	13.3% 11.8%	7.3% 7.6%		
United Arab Emirates		4.1%	30.7%	4.1%	33.7%	17.8%	9.7%	0.0%		
Other Middle East		13.9%	17.0%	10.7%	16.3%	19.6%	11.9%	8.0%		
NORTH AMERICA		17.0%	16.2%	7.9%	9.8%	12.4%	16.2%	19.0%		
Canada		14.3%	16.6%	9.8%	10.9%	14.6%	15.5%	17.5%		
USA		17.4%	16.1%	7.6%	9.6%	12.2%	16.3%	19.2%		
Other North America		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
TOTAL		17.7%	24.8%	15.1%	18.1%	14.7%	5.9%	3.2%		



		INTERNATION	AL TOURIST AR	DIVALC DDO	/INCIAL DICTRI	DUTION			
		INTERNATION	AL TOURIST AR	RIVALS - PKU	/INCIAL DISTRIE 02 2023	BUTION			
	Gauteng	Western Cape	Eastern Cape	KwaZulu- Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Africa	678409	69527	17479	102828	362285	101853	56447	17032	222336
Botswana	39961	1751	744	2901	911	15204	25018	764	3716
Lesotho	60151	8429	2510	11286	1788	681	7269	3105	211600
Malawi	26173	2369	176	668	62	0	994	401	62
Mozambique	55658	1509	279	732	261193	4490	4431	483	0
Namibia	9639	23218	940	867	750	376	1451	7650	46
Swaziland	38462	558	430	60970	83827	2176	1027	0	884
Zambia	29920	2498	169	2710	1082	600	1107	0	54
Zimbabwe	384311	18854	10486	19175	11280	77345	13759	4524	5486
Angola	5275	2364	95	515	77	0	143	0	37
Democratic Republic of Congo	3520	582	92	255	113	46	209	0	92
Ethiopia	971	187	84	36	73	0	44	0	0
Ghana	1709	987	215	135	0	34	0	0	118
Kenya	7012	1191	344	705	351	264	126	0	75
Nigeria 	2655	1070	147	336	116	61	75	15	13
Tanzania 	3949	669	36	310	113	206	225	40	85
Uganda	1720	420	47	165	72	43	263	0	0
Other Africa	7322	2871	685	1064	477	327	309	50	68
Asia	26915	17171	4928	7615	5412	1224	3479	1246	898
China including Hong Kong	5684	2933	834	1195	1044	277	530	112	443
India	13621	7561	2868	4073	2766	608	1503	342	207
Japan Malaysia	1776	844	212	307	273	95	281	0	63
Malaysia	679	698	62	101	62	0	130	0	0
Singapore South Korea	878	1554 717	149 189	351 485	274 192	125	0 93	203 39	0 29
Other Asia	1151					119 0			
Australasia	3125 14841	2865 10448	613 3517	1104 4914	800	2701	941 1753	550 746	155 727
Australia	12363	8009	2867	3901	3642 3007	2072	1274	493	652
New Zealand	2474	2437	650	1013	616	610	479	493 253	74
Other Australasia	4	2437	0	0	19	18	0	0	1
South America	4016	2477	588	521	1213	689	486	45	88
Argentina	340	239	63	104	147	29	59	0	25
Brazil	2375	1082	404	223	592	308	361	33	0
Chile	158	132	30	30	21	11	30	11	10
Other Central & South America	1143	1024	91	164	453	341	37	1	53
Europe	73163	107306	24568	21038	33105	15373	8038	2517	3010
Austria	968	1513	477	167	631	222	42	57	27
Belgium	2765	3938	710	969	1695	620	89	149	0
Denmark	1140	1125	254	195	501	372	149	112	59
Finland	318	806	222	62	216	119	34	23	0
France	8338	13017	2519	2863	6435	2345	895	317	229
Germany	11327	18579	5719	3959	6361	2722	1484	239	384
Ireland	1958	2417	516	461	920	374	79	1	134
Italy	2932	5018	565	532	2010	605	317	111	107
Netherlands	6588	9486	2796	2316	3328	1565	975	275	622
Norway	543	1099	126	159	324	197	71	0	31
Portugal	1370	1641	238	126	333	126	50	25	21
Russian Fed	1966	2110	757	431	386	320	138	182	146
Spain	2223	3590	565	444	1339	455	396	115	107
Sweden	1099	1840	436	237	635	294	57	16	43
Switzerland	2143	4561	1385	706	1395	372	328	127	84
Turkey	1362	1434	62 6730	202	134	196	68	0	0
UK	22701	32529	6730	6802	5750	3829	2382	474	941
Other Europe	3422	2603	492	407	714	642	484	295	73
Middle East	5830	3751	682	1548	554	680	293	72	31
UAE Other Middle Fast	536	565	142	29	28	0	85	0	0
Other Middle East	5294	3186	540	1519	526	680	208	72	31
North America Canada	35553	33257	6043	9310	14463	8483	3959	1206	2051
USA	4359	5473	1105	1483	1987	783 7701	186	340	317
TOTAL	31192 838727	27785	4937 57805	7827	12476 420674	7701	3773	866	1732
IUIAL	030/2/	243936	3/603	147775	4206/4	131003	74456	22864	229140

		INIT	EDNATIONAL TO	JRIST ARRIVALS:	DBOVICIONAL DIS	TRIBUTION O2 2	0024		
	Gauteng	Western Cape	Eastern Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Africa	168 929	21 516	2 272	48 200	116 944	25 323	30 666	18 294	56 652
Botswana	10 120	180	411	239	377	6 294	10 545	152	1 612
Lesotho	30 348	4 219	960	3 410	961	759	6 919	755	52 864
Malawi	9 792	83	35	362	204	1 477	213	0	0
Mozambique	32 387	406	31	321	100 643	3 062	3 387	0	651
Namibia	3 770	12 519	207	602	307	405	717	17 053	469
Swaziland Zambia	17 101 7 716	728 139	134 35	15 464 7 865	9 973 298	3 119 681	3 051 39	236 18	233 44
Zimbabwe	48 547	732	145	18 167	3 569	9 278	5 433	13	574
Angola	1 403	519	4	42	27	0	40	0	29
Democratic	802	181	40	69	27	0	13	0	27
Republic of									
Congo	700	424	42	2/4	20	20	42	2	47
Ethiopia	700 505	124 117	13 67	261 47	29 13	38 3	13 18	2 13	16 16
Ghana Kenya	1 145	180	23	304	266	44	25	0	31
Nigeria	1 946	554	33	621	82	18	68	13	27
Tanzania	711	107	31	105	27	53	54	13	0
Uganda	330	27	34	72	13	36	34	2	16
Other Africa	1 606	701	68	249	127	56	98	20	42
Asia	6 569	4 779	923	2 350	1 439	542	1 335	120	459
China including	1 963	1 797	331	705	411	252	234	79	139
Hong Kong India	2 823	1 222	129	1 265	658	56	784	10	246
Japan	505	444	43	88	120	36	83	0	27
Malaysia	115	158	13	29	31	0	13	0	2
Singapore	122	119	29	13	69	3	27	2	0
South Korea	301	326	43	14	69	53	43	27	16
Other Asia	741	713	337	235	80	142	152	2	29
Australasia	2 711	3 433	732	1 234	1 616	623	406	92	201
Australia	2 329	2 851	554	1 012	1 430	483	339	69	120
New Zealand	383	581	179	222	185	139	67	22	80
Other Australasia									
Central & South	1 714	1 382	239	176	880	122	145	13	40
America									
Argentina	368	367	56	56	261	30	47	13	27
Brazil	752	556	105	39	371	53	72	0	0
Chile	209	193	36	18	54	0	5	0	0
Other Central &	384	266	42	63	194	39	21	0	13
South America Europe	21 943	35 083	8 989	8 680	13 267	6 336	2 687	1 095	1 362
Austria	317	485	150	92	125	169	101	43	16
Belgium	838	1 135	295	436	564	323	136	31	83
Denmark	635	480	120	139	230	335	72	0	32
Finland	133	240	13	54	96	107	2	2	0
France	2 545	3 392	555	1 319	2 077	554	214	100	48
Germany	4 038	7 067 685	2 526	1 783	2 928	1 183 56	472 85	194 27	213 0
Ireland Italy	232 1 142	1 531	241 426	66 274	120 786	56 338	163	2	279
Netherlands	1 814	2 929	758	915	1 247	733	214	144	157
Norway	211	548	42	98	125	145	29	31	2
Portugal	513	762	127	90	257	56	27	0	9
Russian Fed	334	420	141	55	152	53	56	0	43
Spain	184	653	119	146	247	184	27	5	0
Sweden	552 721	963	272 452	165 391	292	95 240	80	27	13 71
Switzerland	613	1 377 239	58	32	426 54	240 18	66 29	40 40	42
Turkey UK	6 386	11 242	2 428	2 339	2 912	1 601	848	353	346
Other Europe	734	937	265	287	629	145	65	56	7
Middle East	988	1 042	272	338	230	160	141	43	107
UAE	147,5	79,0	2,4	40,1	0,0	0,0	15,8	13,4	26,8
Other Middle	841	963	270	298	230	160	125	29	80
East								-5	
North America	7 109	9 120	1 658	2 030	4 191	2 937	664	259	445
Canada	1 163	1 577	275	483	647	317	88	27	94
USA	5 947	7 544	1 383	1 547	3 544	2 620	576	232	351
Total	209 965	76 356	15 086	63 008	138 567	36 043	36 043	19 916	59 265

INTERNATIONAL TOURIST ARRIVALS: PROVISIONAL DISTRIBUTION Q2 2019									
	Gauteng	Western Cape	Eastern Cape	KwaZulu- Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Africa	600 399	69 636	21 466	128 964	293 213	506 853	118 755	18 464	230 025
Botswana	77 942	2 059	1 352	17 301	3 568	44 452	80 559	69	6 644
Lesotho	110 279	12 920	9 974	10 826	13 840	9 445	20 687	6 329	219 109
Malawi	31 825	6 699	949	4 059	694	526	75	0	0
Mozambique	150 745	2 658	656	2 023	162 925	5 112	2 624	0	1 024
Namibia	11 605	22 028	1 162	1 477	871	191	1 647	11 395	1 289
Swaziland	52 079	1 767	1 360	78 375	101 344	983	3 983	54	492
Zambia	33 132	1 620	791	2 967	1 889	307	376	165	249
Zimbabwe	83 204	5 875	3 669	6 582	6 504	444 856	6 764	103	237
Angola	9 048	3 595	116	255	134	0	184	0	165
Democratic Republic of Congo	5 332	921	184	359	118	0	56	0	132
Ethiopia	989	240	20	146	58	61	19	22	38
Ghana	3 060	711	255	303	50	52	153	50	104
Kenya	5 489	1 034	114	594	212	265	336	0	199
Nigeria	8 234	2 633	201	922	282	42	400	39	81
Tanzania	4 268	553	179	524	90	122	161	39	0
Uganda	2 527	371	107	350	59	97	264	49	107
Other Africa	10 641	3 952	376	1 900	575	343	466	151	154
Asia	47 129	33 687	4 919	12 259	7 347	2 387	8 354	1 454	1 791
China including Hong Kong	10 948	9 249	1 597	2 823	2 187	948	1 117	556	676
India	21 416	12 046	1 568	5 304	2 521	420	5 476	420	453
Japan	4 415	2 958	277	907	601	136	460	0	125
Malaysia	1 839	2 144	166	474	559	0	195	0	166
Singapore	1 796	1 785	491	105	793	105	291	105	0
South Korea	1 825	1 489	166	306	284	143	183	86	100
Other Asia	4 891	4 015	653	2 339	403	635	632	286	271
Australasia	13 455	14 970	3 653	6 314	7 149	2 328	2 043	508	874
Australia	12 083	13 010	3 026	5 646	6 519	1 952	1 838	427	619
New Zealand	1 372 0	1 960 0	628 0	666	630 0	376 0	205 0	81 0	255 0
Other Australasia	15 488	10 942	1 985	2 017	6 785	607	1 315	43	159
Central & South America	1 418	1 546	311	190	901	82	239	43	99
Argentina	11 130	7 324	1 336	1 036	4 565	418	1 011	0	0
Brazil	680	552	158	76	105	0	52	0	0
Chile	2 259	1 520	180	714	1 213	107	12	0	60
Other Central & South America Europe	91 298	148 853	36 705	36 358	48 404	18 943	12 229	4 231	5 466
Austria	1 591	1 993	485	459	427	500	474	162	101
Belgium	3 339	5 544	1 547	1 985	2 265	1 053	598	195	476
Denmark	1 570	1 791	398	489	750	775	253	0	170
Finland	537	869	53	207	287	225	30	53	0
France	13 218	16 549	2 684	5 990	8 980	2 078	928	475	368
Germany	14 714	27 163	9 152	6 625	9 365	3 407	1 947	659	939
Ireland	1 745	3 872	1 277	516	586	250	602	142	0
Italy	4 923	7 101	2 062	1 442	3 269	1 143	822	71	271
Netherlands	7 368	11 239	2 602	3 432	3 891	1 878	957	432	464
Norway	954	2 032	231	464	454	449	162	163	70
Portugal	1 954	2 675	457	334	741	131	101	0	51
Russian Fed	1 387	1 558	432	347	569	120	220	0	167
Spain	2 304	5 025	1 288	1 233	2 259	1 031	174	176	0
Sweden	2 133	3 400	815	544	926	294	225	65	42
Switzerland	2 938	5 396	1 815	1 330	1 590	635	286	128	363
Turkey	1 284	1 494	408	273	280	64	212	203	262
UK	25 678	46 778	9 621	9 532	10 232	4 546	3 725	1 073	1 581
Other Europe	3 663	4 374	1 379	1 157	1 532	364	511	234	143
Middle East	4 785	4 835	748	1 412	1 054	259	693	152	197
UAE	282 4 503	167 4 668	33 715	46 1 365	0 1 054	0 259	65 628	7 145	19 179
Other Middle East	49 138	58 285	9 304	13 857	25 008	15 332	5 192	1 666	3 090
North America Canada	5 890	7 386	1 238	2 375	2 790	1 059	499	119	390
USA	43 249	50 900	8 065	11 482	22 219	14 273	4 693	1 547	2 700
Total	821 691	341 208	78 780	201 181	388 960	546 709	148 581	26 519	241 603





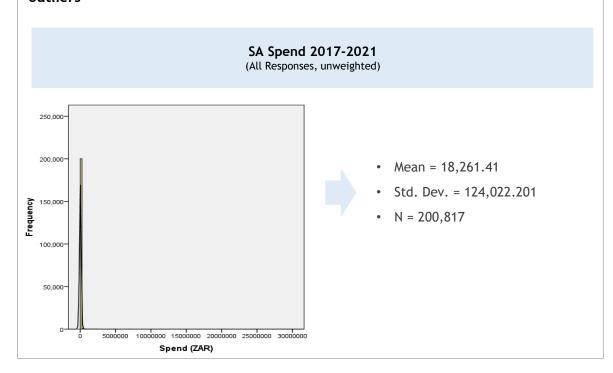
NORMALISING SPEND DATA

SA Tourism reviewed its performance over the past four years. In those four years, we have grown the survey of air arrivals from a summer and winter survey to a monthly survey at two airports and started surveying land arrivals at the 10 busiest land border posts every month. The review provided an opportunity to measure what our marketing has achieved in the past four years and review the departure survey methodology using trend data.

Of particular concern to us was the spend data, which we have been cleaning every quarter. A large number of responses fall below the mean, with several large outliers. Analysing the data confirmed that the responses were valid as the low spenders were mainly from SADC and stayed for only one or two nights. The higher spenders from SADC bought items such as houses and motor cars. As expected, people who stay longer spend more.

Furthermore, spend is seasonal and varies from month to month. Therefore, outliers also vary from one month to the next. The rules for normalising data must be consistent and take these seasonal variations into account. Analysis of spend data showed that the distribution of spend closely resembles an exponential curve rather than a normal curve, which we have been using in our cleaning rules.

SA spend distribution is much closer to an exponential curve than a normal curve; the majority of responses are below the mean with a few very high outliers



Source: 2017-2021 SAT Departure Survey.

NORMALISING SPEND DATA CONTINUED

Transform the log values back to spend values using the following formula:

Exclude all variables that fall outside the cut-off values.

The normalization process leads to the following results for 2021:

Based on this information, SA Tourism has revised the methodology for normalizing spend data.

This chapter provides the details of how the data has been normalized.

SA Tourism now normalizes the spend data by eliminating 3-standard deviations from the logarithmic mean.

y = log10(x)

Compute log of spend variable using the formula above

Calculate the mean of the result obtained in (1) above.

Determine the cut-off criteria using the following formula:

SA Spend Logarithmic Values

Plotting the log of the SA spend produces a normal distribution allowing us to eliminate values outside 3 SDs from the mean

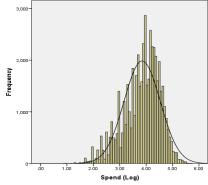
Eliminate

values outside +3

SDs

Mean = 3.85 Std. Dev. = .687 N = 51.272

Log Spend in SA w/o Capex (unweighted)



 Minimum
 Mean
 Maximum
 Std. Deviation

 0.91
 3.85
 5.79
 0.687

Corresponding Spend Values after elimination (unweighted)

- Min. Spend = ZAR 0
- Mean Spend = ZAR 17,965
- Max Spend = ZAR 620,150
- N = 51,272

Source: 2021 SAT Departure Survey.

