



## **About this report:**

The data represented in this report is sourced from Stats SA International Tourism statistical release (previously known as the Tourism and Migration statistical release) and the latest Annual Tourism Performance statistics from South African Tourism (SAT). The report provides an overview of the national and provincial tourism performance from January to December 2023.

The data aims to capture tourism trends from the rest of Africa, focusing on tourist arrivals, expenditure patterns, bed nights, top 10 African source markets, purpose of visits and accommodation usage.



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### 1. Definitions

**Visitor** – Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for 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.

**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.

#### **Definitions used specifically in the Stats SA releases**

Region refers to the following country classification:

- Africa: SADC and 'other' Africa (east and central Africa, west Africa and north Africa).
- Africa refers to all the countries in Africa (both mainland and island countries).
- **SADC** refers to the fourteen countries, excluding South Africa, which belong to the Southern African Development Community.

## Methodology

The tourism data represented in this report is based on findings obtained from South African Tourism's Analytics and Insights Unit and is derived from South African Tourism's Departure Survey.

The survey has been deployed by South African Tourism since 2001 to monitor and measure international tourism behaviour upon departing the country.

The survey aims to track tourist travel behaviour, expenditure, accommodation usage, experiences as well as satisfaction of South Africa as a holiday and business destination.

The survey is conducted monthly and covers South Africa's two main international airports (Oliver Tambo and Cape Town), as well as the 12 main land border posts.



## 2. Executive Summary

- The Western Cape held a 4.7% share of SA's Africa market in 2023 reaching 301,471 tourist arrivals from the rest of Africa, increasing by 40.5% year-on-year (y-o-y). In relation to 2019, African tourist arrivals to the Western Cape recovered by 88.0%.
- In relation to all provinces, the Western Cape ranked second for foreign direct spend (R3.7 billion) from the rest of Africa in 2023 and fourth for total bed nights (4.9 million) recorded by tourists from the rest of Africa.
- The SADC region maintained its position as the Western Cape's top region for African tourists, with 8 out of the top 10 source markets originating from the region in 2023.
- Namibia, Zimbabwe and Lesotho ranked as the Western Cape's leading African markets for tourist arrivals in 2023, followed by Malawi and Zambia in fourth and fifth positions, respectively. The Western Cape received 84,781 visitors from Namibia, 84,443 from Zimbabwe, and 41,036 from Lesotho. These figures represented a y-o-y increase of 13% for tourists from Namibia, 78% for those from Zimbabwe and 95% for visitors from Lesotho.
- Visitors from Namibia favoured cozy guesthouses and convenient self-catering establishments for their overnight accommodation when visiting South Africa.
   Meanwhile, tourists from Zimbabwe displayed diverse preferences, often opting for the comfort of hotels, the personalised touches of guesthouses, the charm of B&Bs, the adventure of game lodges, and the flexibility of Airbnb accommodation. On the other hand, tourists from Lesotho typically leaned towards the independent experience offered by self-catering establishments, the communal atmosphere of backpackers, and the outdoor feel of camping sites when visiting South Africa.
- In 2023, tourist arrivals to Cape Town (via air) originating from the rest of Africa increased by 34.8% compared to 2022 and recovered fully in relation to 2019 (89,467). In addition, Cape Town saw a 6.0% increase in the rest of Africa air arrivals from Zimbabwe, with a total count of 19,025 arrivals recorded in 2023. This reflected a full recovery against the Zimbabwean air arrivals to Cape Town in 2019 (9,623).
- Among the top 10 source markets to Cape Town (via air) in 2023, a full recovery was made in relation to 2019 for tourist arrivals from Zimbabwe, Kenya, Mozambique, Botswana, Tanzania, Nigeria, and Uganda.
- Africa is the largest contributor to direct air travel into Cape Town, followed by Europe.

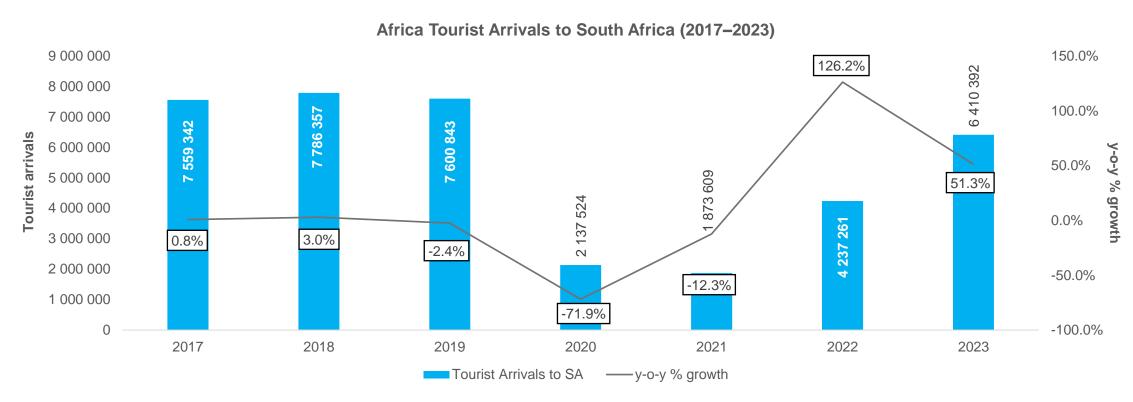


## 3. Tourism Performance in South Africa



### **Tourism Performance in South Africa**

- In 2023, South Africa saw a notable increase in the number of tourists from the rest of Africa, with a total of 6.4 million arrivals.
- This represented a y-o-y growth of 51.3% in relation to the previous year.





### **Tourism Performance in South Africa**

	Top African Source Markets to South Africa (2018–2023)							
Rank	Markets	2018	2019	2020	2021	2022	2023	y-o-y % change
1	Zimbabwe	2 208 930	2 258 794	684 546	410 730	1 233 790	2 106 940	70.8%
2	Mozambique	1 360 896	1 333 195	422 537	522 866	944 308	1 341 037	42.0%
3	Lesotho	1 739 188	1 563 448	448 745	355 255	835 921	1 163 826	39.2%
4	Eswatini	883 735	917 631	214 947	177 650	403 762	733 949	81.8%
5	Botswana	688 566	668 315	129 467	103 158	262 232	363 025	38.4%
6	Namibia	200 367	184 431	54 511	91 471	137 388	160 078	16.5%
7	Zambia	165 968	152 064	46 486	68 669	116 076	145 244	25.1%
8	Malawi	197 317	199 079	53 365	56 313	114 352	138 918	21.5%
9	Kenya	29 193	30 329	6 899	7 946	21 308	42 403	99.0%
10	Angola	64 859	61 995	15 443	9 312	32 194	39 265	22.0%

- In 2023, Zimbabwe was the top African source market to South Africa.
- A total of 2.1 million tourists travelled from Zimbabwe to South Africa in 2023, marking a substantial 70.8% increase compared to 2022 and a notable recovery of 93.3% in relation to 2019.
- Mozambique (1.3 million tourists) and Lesotho (1.1 million tourists) were the second and third largest African source markets for South Africa.





## **Accommodation Usage in SA**

	Accommodation usage in SA by the 10 top African Source Markets to the WC (2023)								
WC Top 10 African Source Markets	Hotels	Guest House	BnB	Self- Catering	Game Lodge	Backpacker	Camping	Friends & Family	Air B&B
Namibia	136 771	146 960	80 450	144 044	10 061	12 569	3 370	611 308	3 057
Zimbabwe	898 533	313 437	162 911	666 169	178 753	48 497	169	32 407 645	43 617
Lesotho	104 837	82 980	16 109	1 293 268	12 964	374 981	33 799	11 828 816	0
Malawi	343 380	21 975	8 184	55 314	12 615	11 867	0	1 199 850	4 780
Zambia	391 915	41 609	3 587	89 390	10 926	19 036	0	695 701	4 281
Angola	109 170	39 730	19 855	45 847	3 771	0	678	173 079	1 405
Botswana	139 030	57 895	33 748	27 634	27 576	3 119	1 634	922 101	7 713
Mozambique	332 305	74 734	10 385	68 904	12 924	1 012	982	12 779 344	1 404
Kenya	157 273	16 729	19 218	51 892	1 302	12 246	3 625	131 127	13 799
Nigeria	69 668	10 291	4 307	33 577	715	218	139	109 636	3 985

Source: SA Tourism (2024)

Understanding specific accommodation preferences of the diverse African markets within South Africa is crucial for tailoring and enhancing the appeal of various accommodation establishments. By gaining detailed insights into these preferences, businesses can better meet the needs of these markets, ultimately leading to an increase in bookings and overnight stays in the Western Cape.

## Accommodation preferences for visitors from the top three African source markets to the Western Cape:

- 1. When visiting South Africa, tourists from **Namibia** often chose to stay in guesthouses and self-catering establishments for their overnight accommodation.
- 2. Tourists from **Zimbabwe** preferred to stay in hotels, guesthouses, B&Bs, game lodges, and Airbnbs when visiting South Africa.
- 3. When visiting South Africa, tourists from **Lesotho** often preferred to stay in self-catering establishments, backpackers, and camping sites.



\*WC – Western Cape

\*SA – South Africa

\*B&B - Bed and Breakfast

\*Airbnb - Air Bed and Breakfast

## **Tourists Purpose of Visit to SA**

	Tourists Purpose of Visit to SA by Source Market (2023)							
Top 10 Source Markets to the WC	Holiday	Shopping personal	Shopping business	Business traveller	MICE	Medical	VFR	Religion
Namibia	17.1%	1.9%	3.5%	16.5%	10.7%	2.5%	33.9%	2.7%
Zimbabwe	5.3%	11.7%	16.4%	2.5%	2.5%	2.0%	53.9%	1.5%
Lesotho	1.1%	0.5%	1.5%	0.6%	1.0%	1.1%	79.6%	1.1%
Malawi	7.3%	3.0%	46.9%	5.7%	4.4%	0.7%	25.7%	1.1%
Zambia	4.9%	3.2%	39.7%	12.2%	10.4%	1.1%	20.3%	1.5%
Angola	23.5%	2.0%	0.6%	12.5%	11.2%	11.3%	23.7%	0.5%
Botswana	14.4%	2.0%	6.0%	26.9%	2.8%	1.3%	33.7%	3.8%
Mozambique	9.2%	10.3%	3.2%	0.3%	0.6%	2.4%	72.2%	0.3%
Kenya	16.3%	0.5%	0.5%	10.5%	29.2%	1.2%	15.8%	1.8%
Nigeria	19.6%	0.7%	0.3%	12.4%	21.4%	1.1%	25.3%	1.9%

Obtaining a comprehensive understanding of the reasons behind visits from African markets to South Africa can provide Western Cape tourism stakeholders with valuable guidance regarding which tourism experiences are most attractive to visitors from the top 10 African markets visiting the province.

This information can be used to draw more tourists to the Western Cape, ultimately leading to increased socio-economic benefits in the province.

#### Purpose of visit:

- In 2023, tourists from Namibia, Zimbabwe, Mozambique, and Lesotho visited South Africa primarily to spend time with friends and relatives (VFR).
- Travellers from Malawi and Zambia visited mainly for businessrelated shopping purposes.
- For Kenyan and Nigerian tourists, the primary reason for visiting South Africa was related to Meetings, Incentives, Conferences, and Exhibitions (MICE).
- Lastly, tourists from Angola visited South Africa mainly for VFR and holiday purposes.



Source: SA Tourism (2024)

## 4. Tourism Performance: Provincial Distribution



### **Tourism Performance:** Provincial Distribution

	Provincial Tourism Performance (2023)							
Province	Tourist Arrivals from Africa	2023/22 % Change in Africa Tourist Arrivals	Total Foreign Direct spend (billions/million)	Total Bed- nights	*Formal Bed Nights			
Gauteng	2 871 034	65.2%	R28.2 billion	41 377 380	12 811 147			
Western Cape	301 471	40.5%	R3.7 billion	4 957 856	3 251 568			
Eastern Cape	77 419	89.4%	R733 million	1 894 095	654 740			
KwaZulu Natal	413 399	6.0%	R2.0 billion	4 433 230	3 181 274			
Mpumalanga	1 510 295	55.1%	R2.9 billion	14 292 801	13 425 525			
Limpopo	413 212	28.3%	R2.9 billion	2 126 199	642 848			
North West	251 703	16.8%	R726 million	2 481 468	1 468 889			
Northern Cape	83 347	-10.5%	R179 million	844 884	469 986			
Free State	858 644	45.5%	R1.1 billion	9 076 099	8 772 223			

Source: SA Tourism (2024)

Tourist arrivals from Africa into the Western Cape grew by **40.5% y-o-y in 2023** and recovered fully against 2019.

In 2023, of all nine provinces, the Western Cape ranked:

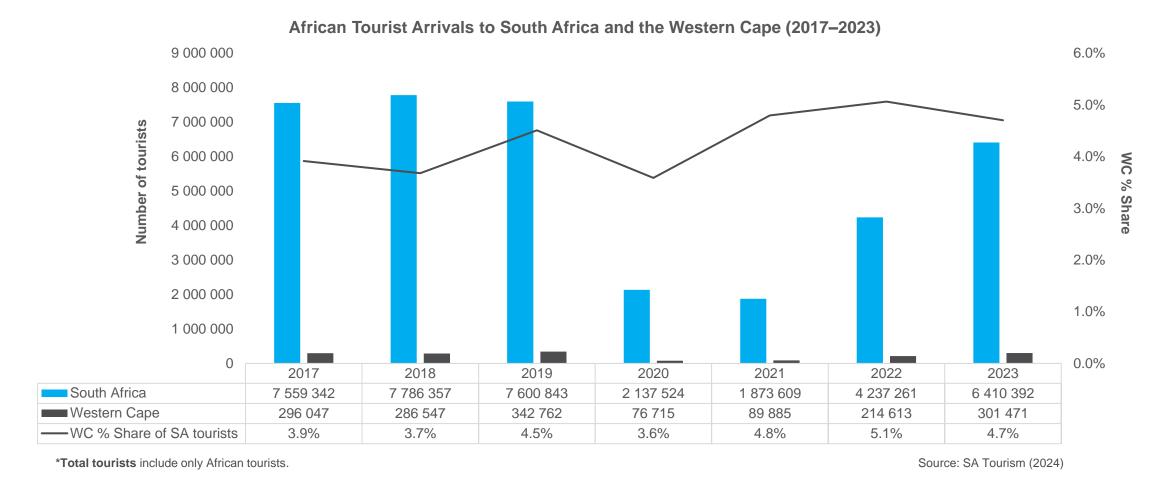
- Sixth Highest in tourist arrivals from Africa: 301,471
- Second Highest in foreign direct spend by African tourists:
   R3.7 billion
- Fourth highest in total bed nights from African tourists: 4.9
   million
- Fourth Highest in formal bed nights from African tourists:
   3.3 million



## 5. Tourism Performance in the Western Cape



# Western Cape Tourism: The Western Cape held a 4.7% share of SA's tourist arrivals from Africa in 2023

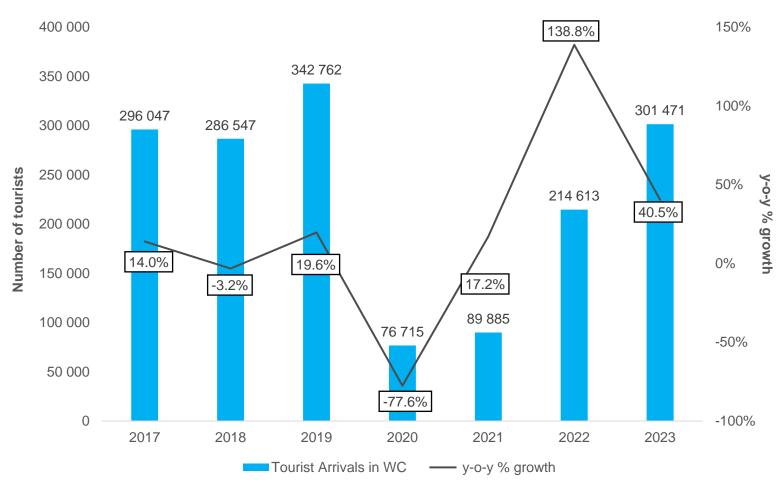




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## Western Cape Tourism: Tourist Arrival Trends

#### Africa tourist arrivals to the Western Cape (2017–2023)

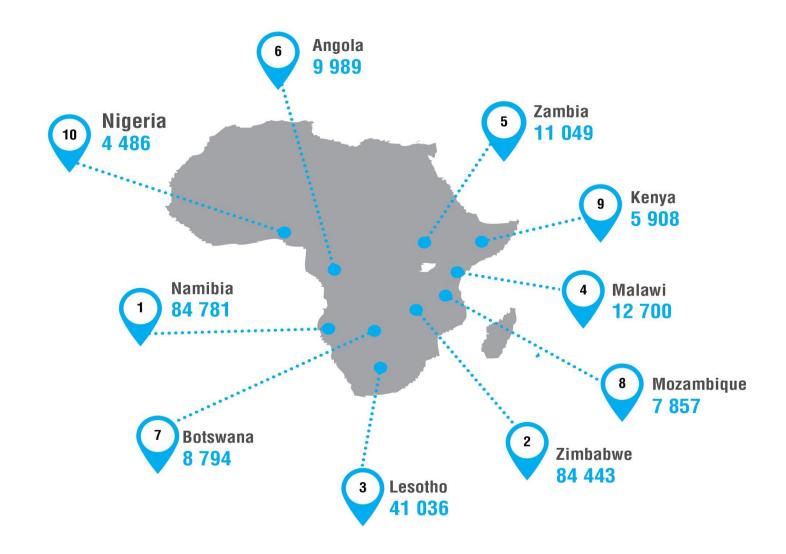


- In 2023, the Western Cape welcomed a total of 301,471 tourists from the African region.
- This represented a substantial 40.5% year-onyear growth in tourist arrivals when compared to the previous year.





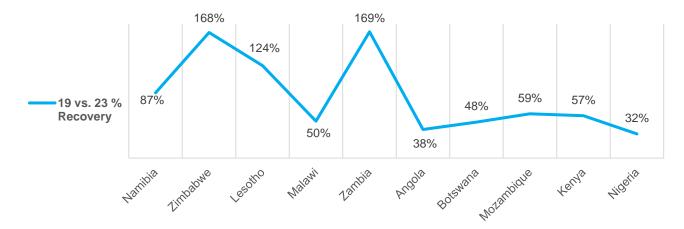
## Western Cape Tourism: Namibia, Zimbabwe and Lesotho were the top African source markets for tourist arrivals to the Western Cape in 2023





## **Top African Markets to WC**

- The SADC region maintained its position as the Western Cape's top region for African tourists, with 8 out of the top 10 source markets originating from the region.
- In 2023, Zimbabwe, Lesotho and Zambia had fully recovered in terms of tourist arrivals compared to 2019.



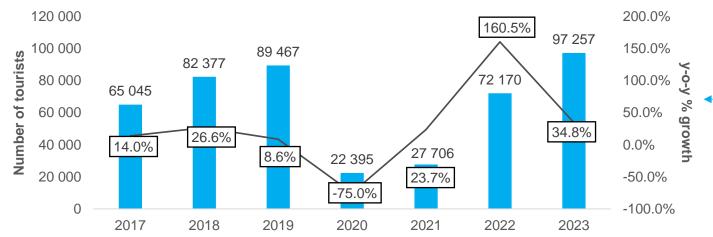
		Tol	o 10 African Mai	kets to the West	ern Cape (2018–2	2023)		
Rank	Markets	2018	2019	2020	2021	2022	2023	Y-o-Y % Growth
1	Namibia	105 817	96 950	28 566	48 454	75 351	84 781	13%
2	Zimbabwe	35 714	50 139	7 963	7 283	47 503	84 443	78%
3	Lesotho	31 547	33 104	12 378	11 133	20 992	41 036	95%
4	Malawi	17 229	25 617	6 447	1 660	9 732	12 700	30%
5	Zambia	4 768	6 527	1 405	2 071	6 571	11 049	68%
6	Angola	17 348	26 011	3 652	2 714	8 688	9 989	15%
7	Botswana	8 399	18 219	2 397	1 668	5 599	8 794	57%
8	Mozambique	10 892	13 218	2 739	2 597	7 439	7 857	6%
9	Kenya	3 532	10 403	958	910	4 193	5 908	41%
10	Nigeria	10 599	13 831	2438	1491	3 515	4 486	28%



Source: SA Tourism (2024)

## Africa Tourist Arrivals to Cape Town (via air)

#### Africa tourist arrivals into Cape Town (via air) (2017–2023)



 African tourists travelling to Cape Town by air in 2023 increased by 34.8% compared to 2022. The 2023 number for tourist arrivals from Africa have fully recovered compared to the pre-pandemic figure in 2019.

	Top 10 Africa markets to Cape Town (via air) (2018–2023)							
Rank	Markets	2018	2019	2020	2021	2022	2023	Y-o-Y % change
1	Zimbabwe	8 086	9 623	2 101	7 541	17 952	19 025	6.0%
2	Namibia	24 924	23 981	5 578	9 554	17 910	17 690	-1.2%
3	Angola	22 085	22 052	5 448	1 439	11 406	13 619	19.4%
4	Kenya	4 518	5 376	1 380	1 317	4 879	11 708	140.0%
5	Mauritius	3 573	5 578	1 413	44	1 228	4 812	291.9%
6	Mozambique	126	99	39	37	967	3 870	300.2%
7	Botswana	642	2 703	723	672	3 391	3 771	11.2%
8	Tanzania	1 183	1 817	595	828	2 389	3 338	39.7%
9	Nigeria	3 711	2 709	861	1 368	1 511	2 903	92.1%
10	Uganda	942	1 797	498	462	1 508	2 373	57.4%

Source: Stats SA (2023)

**Zimbabwe** was the largest African source market to Cape Town via air in 2023.

Total air arrivals: 19,0252023/22 y-o-y growth: 6.0%

- Significant y-o-y growth rates were recorded in 2023 for air arrivals from Kenya (140.0%), Mauritius (291.9%), and Mozambique (300.2%).
- Among the top 10 source markets, a full recovery was made in relation to 2019 for tourist arrivals from Zimbabwe, Kenya, Mozambique, Botswana, Tanzania, Nigeria, and Uganda.



## Cape Town International schedule: Rest of Africa

Rest of Africa							
I (CSt OI	Airica						
AIR BOTSWAN	A Air Botswana	Gaborone (GBE)   3x per week					
air mauritiu	Air Mauritius	Mauritius (MRU)   2x week					
& AIRLINK	< Airlink	Windhoek (WDH)   19x pw Walvis Bay (WVB)   13x pw Harare (HRE)   Daily Victoria Falls (VFA)   6x week Maun (MUB)   Daily Maputo (MPM)   4x week					
Eswatini Ai	r Eswatini Air	Manzini (SHO)   3x week					
Ethiopian 🚄	Ethiopian Airlines	Addis Ababa (ADD)   11x per week					
Fly Namibia	FlyNamibia	Windhoek (WDH)   4x per week Walvis Bay (WVB)   4x per week					
Kenya Airways Eta 5 Nuta af Africa	Kenya Airways	Nairobi (NBO)   3x week, NBO – Livingstone (LVI)   3x week NBO – Victoria Falls (VFA)   3x week					
& KANI	LAM	Maputo (MPM)   3x per week					
PROFLIGHT #ZAMB	Proflight Zambia	Lusaka (LUN)   3x week					
( RwandAi	RwandAir	Kigali (KGL) - Harare (HRE)   3x week					
TAAG 🌘	TAAG	Luanda (LAD)   Daily					

 Africa is the largest contributor to direct air travel into Cape Town, followed by Europe. The figure on the left shows the air connectivity between the rest of Africa and Cape Town.



