

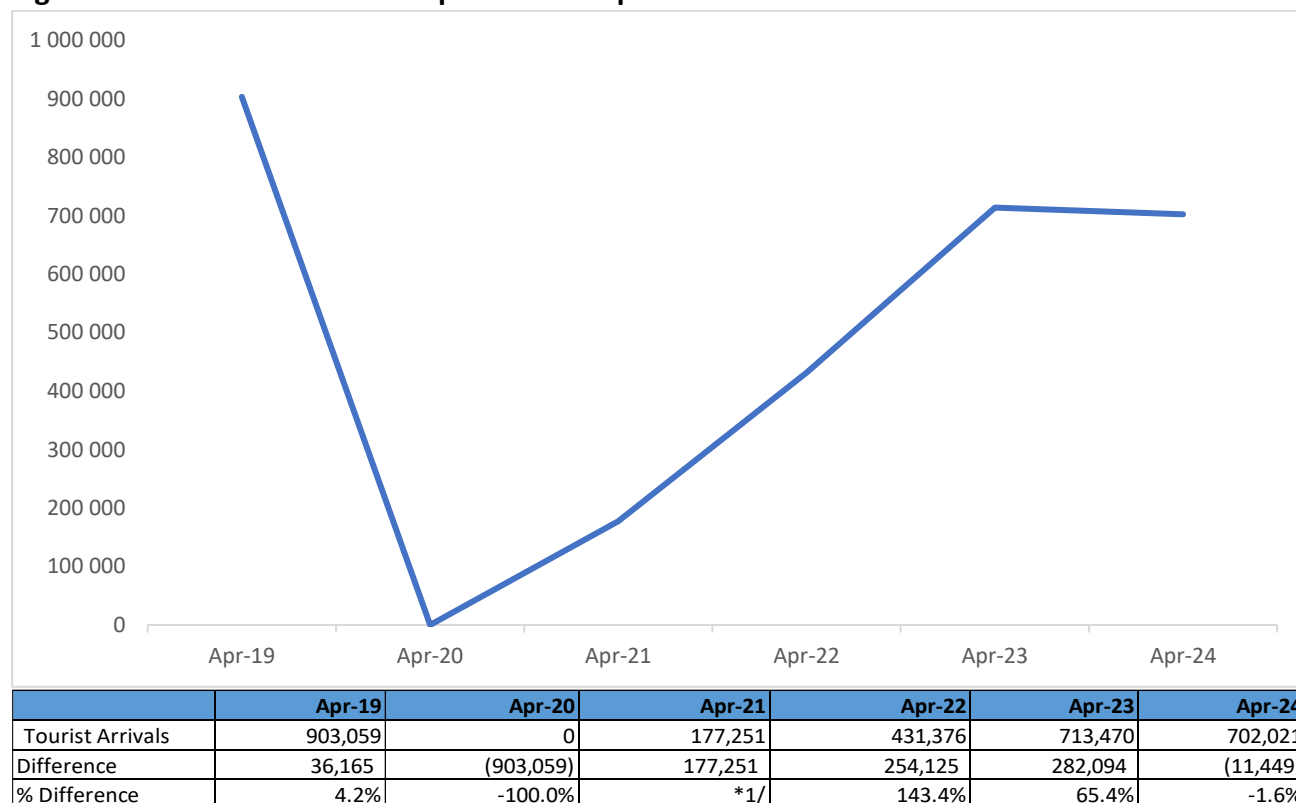
SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR APRIL 2024

Statistics South Africa (Stats SA) has published data on the number of tourists for April 2024 and this report provides further analysis of the tourists that travelled to South Africa during this period as compared to the same month in 2023. This report also includes the analysis of tourist arrivals for the first four months of 2024 compared to the same period in 2023.

TREND ANALYSIS: APRIL 2019 – APRIL 2024

A total of 702 021 tourist arrivals was recorded in April 2024 which was a decrease of -1.6% (-11 449) compared to the same month in 2023. Figure 1 below indicates tourist arrivals for the period April 2019 to April 2024. In April 2020, due to the closure of country borders and travel restrictions, there were no tourist arrivals recorded for the month. However, in April 2021, with the opening of country borders and travel permissions, there were 177,251 tourist arrivals recorded. Tourist arrivals then increased from 177 251 in 2021 to 431 376 in 2022 which was an increase of +143,4% (+254 125). Tourist arrivals increased by +65,4% (+282 094) in 2023 compared to 2022. The tourist arrivals in April 2024 were at a level of -22.3% compared to April 2019, before the COVID-19 pandemic.

Figure 1: Total Tourist Arrivals April 2019 to April 2024



APRIL 2024 COMPARED TO APRIL 2023 BY REGION

Table 1 below indicates tourist arrivals by region for April 2024 compared to the same month in 2023. With regards to percentage growth, Central and South America recorded the highest increase of +71,4% (+2 276) followed by North America (+5,2%; +1 620) and Asia (+3,4%; +542). Middle East, Europe and Australasia experienced a decline in tourist arrivals of -6,9%, -4,1% and -1,2% respectively during this month compared to the same month of the previous year. Africa also recorded a decrease of -2,0% (-11 273) however this region remains the main source of tourist arrivals to the country accounting for 77,0% (+540 388) of total tourist arrivals recorded during April 2024. One of the reasons for the decline could have been led by Easter holidays falling in March during this year while it was in April during 2023.

Table 1: Total Tourist Arrivals by Region: April 2024 vs. April 2023

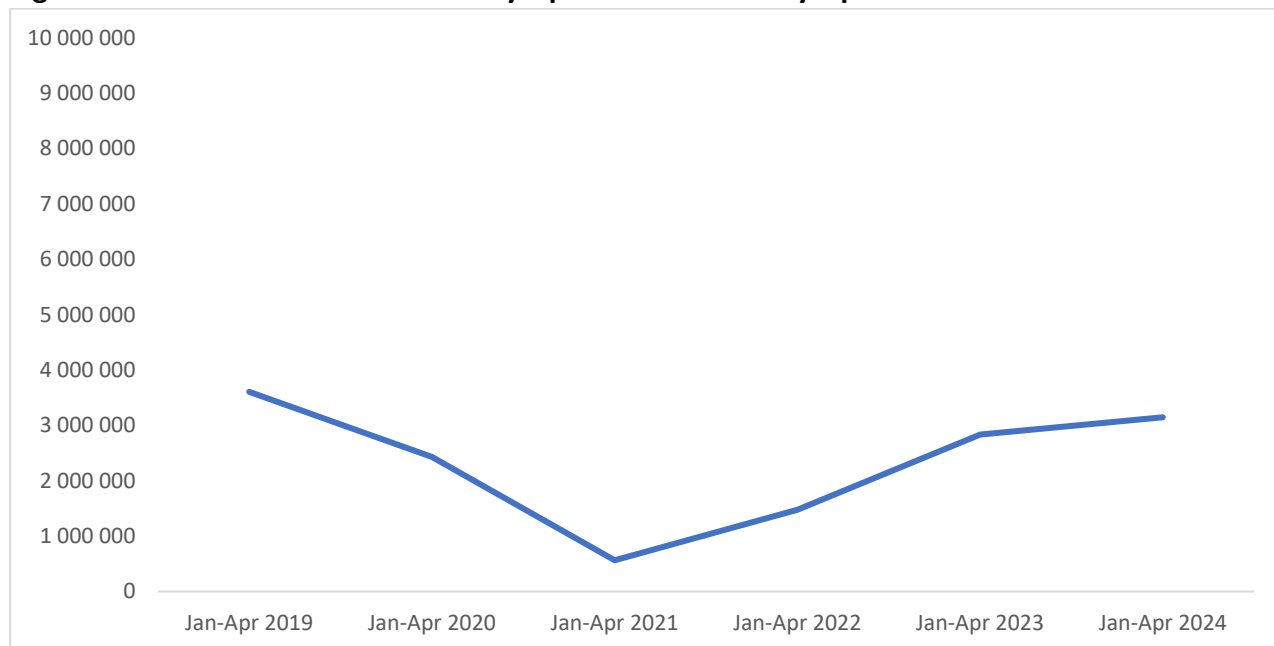
	April 2023	April 2024	Diff	% Diff
EUROPE	97,243	93,213	-4,030	-4.1%
NORTH AMERICA	31,029	32,649	1,620	5.2%
CENTRAL & SOUTH AMERICA	3,188	5,464	2,276	71.4%
AUSTRALASIA	9,959	9,841	-118	-1.2%
MIDDLE EAST	3,318	3,089	-229	-6.9%
ASIA	15,910	16,452	542	3.4%
TOTAL OVERSEAS	160,647	160,708	61	0.0%
TOTAL AFRICA	551,661	540,388	-11,273	-2.0%
Unspecified	1,162	925	-237	-20.4%
GRAND TOTAL	713,470	702,021	-11,449	-1.6%

Source: Stats SA Tourism and Migration Report. April 2024 and tourist arrivals data cuts

JANUARY-APRIL BY REGION FOR THE PERIOD 2019 TO 2024

Tourist arrivals for the period January-April 2019-2024 are indicated in figure 2 below. Total tourist arrivals went up by +11,1% (+315 228) for the period January-April 2024 compared to the same period in 2023. However, the tourist arrivals during January to April 2024 were at a level of -12.7% compared to the tourist arrivals recorded in the pre-COVID period of 2019 (Jan-April).

Figure 2: Total Tourist Arrivals January-April 2019 to January-April 2024



	Jan-Apr 2019	Jan-Apr 2020	Jan-Apr 2021	Jan-Apr 2022	Jan-Apr 2023	Jan-Apr 2024	Jan-Apr 2024 compared to Jan-Apr 2019
Tourist Arrivals	3,607,126	2,429,177	564,188	1,478,934	2,835,281	3,150,509	
Difference	(48,709)	(1,177,949)	(1,864,989)	914,746	1,356,347	315,228	(456,617)
% Growth	-1.3%	-32.7%	-76.8%	162.1%	91.7%	11.1%	-12.7%

Source: Stats SA Tourism and Migration report, April 2024 and tourist arrivals data cuts

Table 2 further indicates that total tourist arrivals from overseas markets increased by +7,4% (+53 937). Central & South America (+82,5%) recorded the highest increase followed by Asia (+19,1%), Europe (+6,1%), and North America (+4,8%). Middle East and Australasia recorded a decline of -21,8% and -0,1% for the same period under review.

In Central and South America, Brazil recorded the highest increase in volume (+9 633; +149,8%) for the same period under review. In Asia, China recorded the highest increase in volume (+4 400; +46,1%). Germany had recorded the highest increase in volume (+5 202; +4,8%) in the Europe region. In North America, United States of America has recorded the highest increase in volume (+4 529; +4,3%).

In the Middle East region, Israel recorded the largest drop in tourist numbers during January-April 2024, experiencing a decline of -5,045 (-62.9%) compared to the same period in 2023. Similarly, New Zealand also observed a notable decrease in tourist volume, with a decline of -212 (-3.4%).

Tourist arrivals from Africa increased by +12,5% (+261 798) during the same period under review and this region remains the main source of tourist arrivals to the country accounting for 75,1%

(2 364 582) of total tourist arrivals during January-April 2024.

In terms of volume, the increase recorded from the African continent was driven by an increase of (+123 771; +17,9%) from Zimbabwe followed by Mozambique (+90 378; +20,2%) and Eswatini (+36 992; +16,6%) as indicated in Table 3 below.

TABLE 2: JANUARY-APRIL 2024 COMPARED TO JANUARY-APRIL 2023/2019

	January-April 2023	January-April 2024	2024 compared to 2023 Diff	2024 compared to 2023 %	January- April 2019	Diff: 2024 compared to 2019	% Diff: 2024 compared to 2019
EUROPE	484,539	513,940	29,401	6.1%	602,064	-88,124	-14.6%
NORTH AMERICA	125,824	131,880	6,056	4.8%	135,359	-3,479	-2.6%
CENTRAL & SOUTH AMERICA	13,383	24,427	11,044	82.5%	40,740	-16,313	-40.0%
AUSTRALASIA	34,582	34,548	-34	-0.1%	38,523	-3,975	-10.3%
MIDDLE EAST	14,393	11,251	-3,142	-21.8%	16,021	-4,770	-29.8%
ASIA	55,581	66,193	10,612	19.1%	100,337	-34,144	-34.0%
TOTAL OVERSEAS	728,302	782,239	53,937	7.4%	933,044	-150,805	-16.2%
TOTAL AFRICA	2,102,784	2,364,582	261,798	12.5%	2,669,365	-304,783	-11.4%
Unspecified	4,195	3,688	-507	-12.1%	4,717	-1,029	-21.8%
GRAND TOTAL	2,835,281	3,150,509	315,228	11.1%	3,607,126	-456,617	-12.7%

Source: Stats SA Tourism and Migration Report. April 2024 and tourist arrivals data cuts

Table 3 below gives the rankings of the top ten African source markets for the period January-April 2024 compared to January-April 2023. Most of the top ten African source markets remained in the same position. Kenya moved up from 10th position in 2023 to 9th position in 2024, and Angola dropped from 9th position in 2023 to 10th position in 2024. Lesotho and Angola recorded a negative growth rate of -9,0% and -6,8% respectively for the period under review. Malawi recorded the highest increase of +27,3% followed by Mozambique (+20,2%) and Zambia (+19,7%).

Table 3: South Africa's Top 10 African Source Markets: January-April 2024 vs. January-April 2023

Country	Rank: January-April 2024	Tourist Arrivals January-April 2024	Rank: January-April 2023	Tourist Arrivals January-April 2023	% Change
Zimbabwe	1	813,928	1	690,157	17.9%
Mozambique	2	536,896	2	446,518	20.2%
Lesotho	3	388,644	3	426,933	-9.0%
Eswatini	4	260,248	4	223,256	16.6%
Botswana	5	119,396	5	106,481	12.1%
Namibia	6	51,726	6	50,257	2.9%
Zambia	7	50,643	7	42,320	19.7%
Malawi	8	48,383	8	38,022	27.3%
Kenya	9	14,273	10	12,905	10.6%
Angola	10	13,329	9	14,304	-6.8%

Source: Stats SA Tourism and Migration Report. April 2024 and tourist arrivals data cuts

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-April 2024 with January-April 2023, all of the top 10 overseas markets recorded an increase in tourist arrivals. The Netherlands recorded the highest increase of +9,3%. With regards to volume, UK remained the main source market from overseas recording a growth of +2,9%. All of the top ten overseas source markets remained in the same position for the period January-April 2024 compared to January-April 2023.

Table 4: South Africa's Top 10 Overseas Source Markets: January-April 2024 vs. January-April 2023

Country	Rank: January-April 2024	Tourist Arrivals January-April 2024	Rank: January-April 2023	Tourist Arrivals January-April 2023	% Change
UK	1	150,411	1	146,243	2.9%
Germany	2	113,085	2	107,883	4.8%
USA	3	110,428	3	105,899	4.3%
The Netherlands	4	49,048	4	44,876	9.3%
France	5	47,166	5	43,215	9.1%
Australia	6	28,467	6	28,259	0.7%
India	7	22,373	7	22,297	0.3%
Canada	8	21,452	8	19,925	7.7%
Switzerland	9	17,385	9	16,836	3.3%
Belgium	10	16,861	10	15,558	8.4%

Source: Stats SA Tourism and Migration Report. April 2024 and tourist arrivals data cuts

REFERENCES

1. Statistics South Africa 28 May 2024, April 2024 Tourism and Migration report.